

# Records and Information Management (RIM) 101

1 Mar. 2022: Part 1

Why RIM? • What is a record? • Getting started



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# Part 1

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Why RIM?

What is a record?

Getting started



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# Part 2

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Record Lifecycle

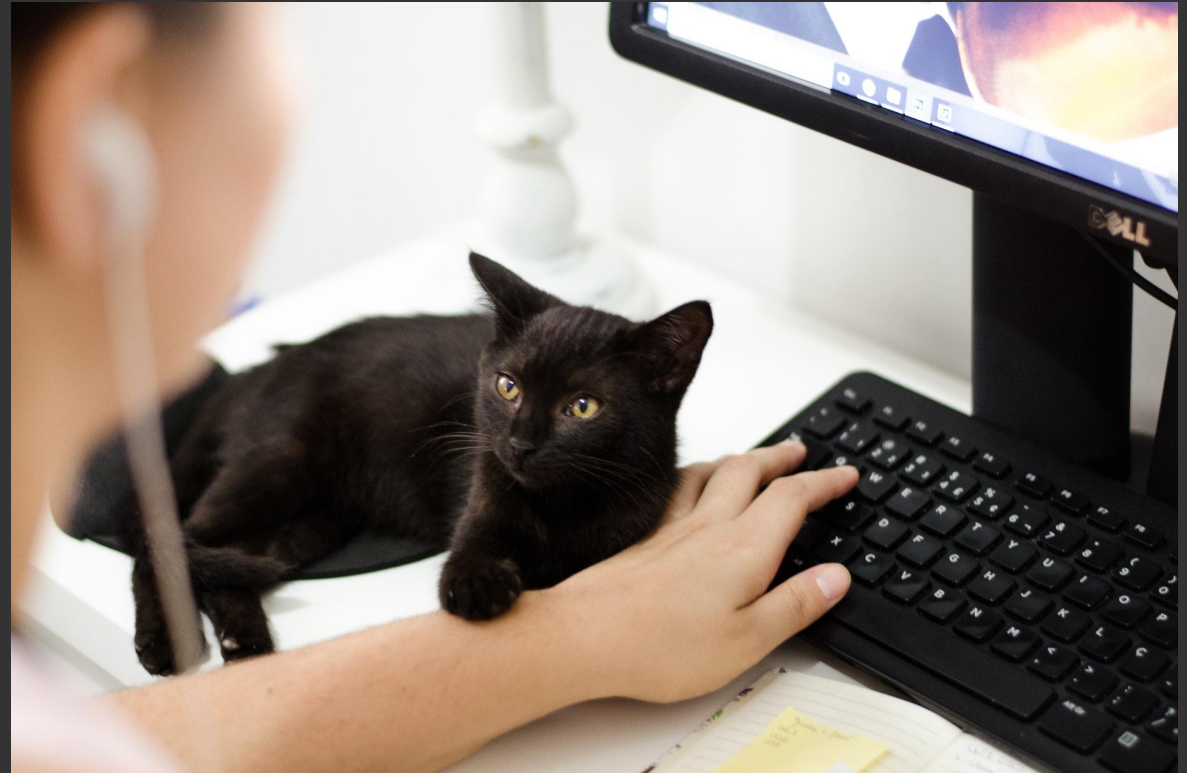
Retention/Disposition

Appraisal

Retention Schedules

General Retention Schedules

Records Center



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# Managing Digital Formats

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Social Media

Databases

Email

Chat/IM/Text Messages

Shredding After Digitizing



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# How much RIM experience do you have?

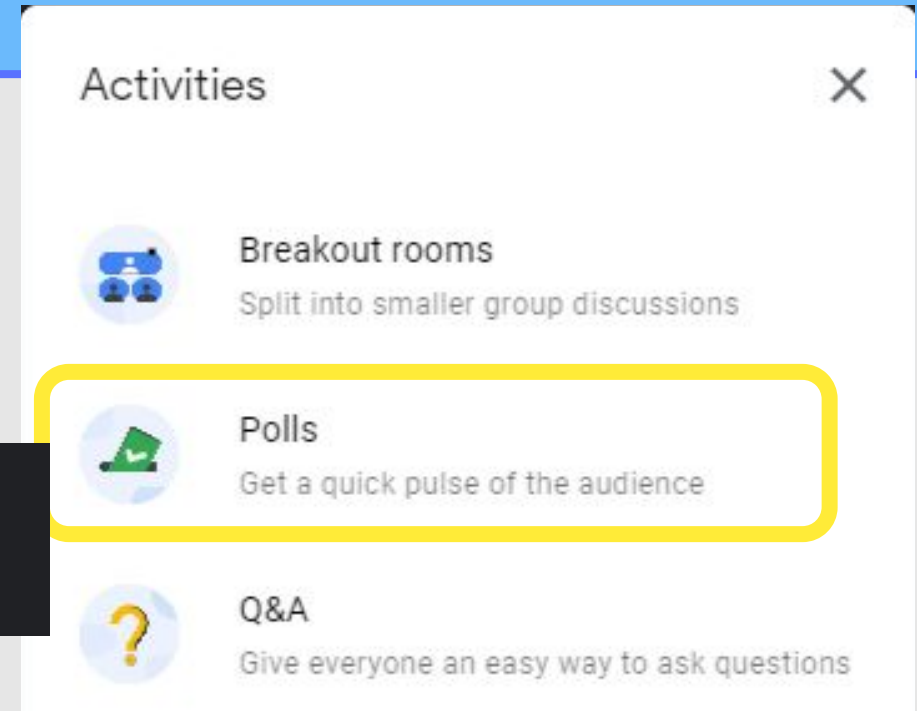
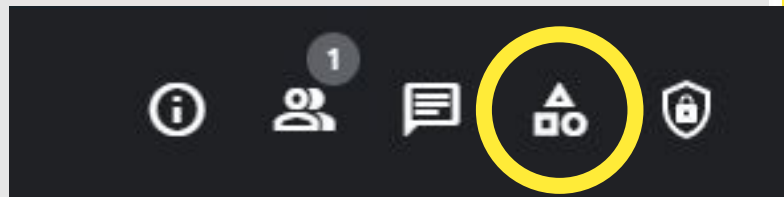
A. Years and years

B. A lot

C. Some

D. A little

E. This training has to count for something, right?



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# How much RIM experience do you have?

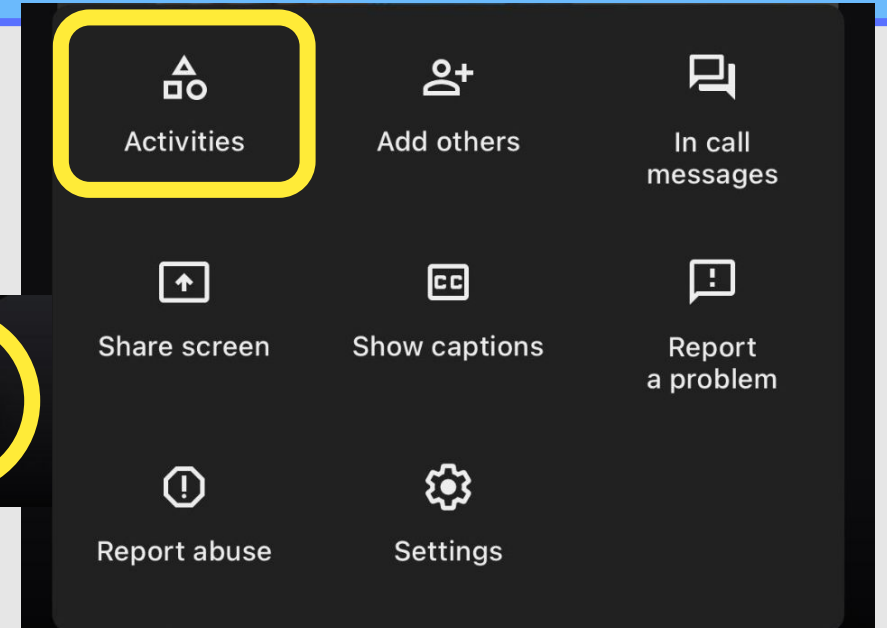
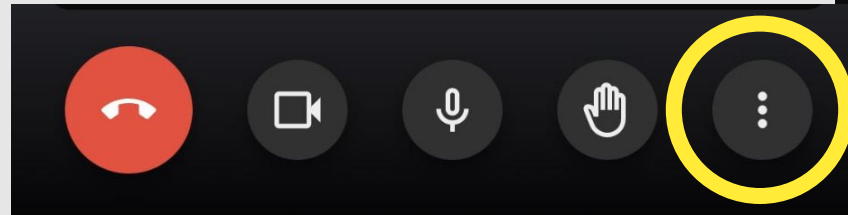
A. Years and years

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# What are you hoping to learn today?

(please write answer in comments)



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# Cats or dogs?

- A. Cats
- B. Dogs
- C. Both
- D. Neither
- E. This isn't even a question



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# What is RIM?

## Why RIM?



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# What is RIM?

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Records and  
Information  
Management

Records and information are assets and should be managed accordingly.



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# RIM Terms

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## Record series

A group of related records

## Retention

How long a record is kept

## Disposition

What happens to a record after retention is met

## Retention schedule

A plan detailing the retention and disposition of a group of records



# Benefits of an active RIM program

---

1. Increased efficiency
2. Reduced cost
3. Reduced risk
4. Increased transparency
5. Better documentation of agency and state history
6. Legal compliance



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# 1. Increased efficiency

"The more stuff jammed into a closet, the harder it is to find that winter scarf when it gets cold.

"Enlarging the closet or building another closet will not necessarily make it easier to find that scarf.



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# 1. Increased efficiency

"A more efficient approach is to **remove the things that are no longer needed** – like the now-adult daughter's elementary school backpacks and the long-unused yoga mats."

Tom Corey, Esq., "ROT or Not?", *Information Management Journal*, Arma International, July/August 2017



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## 2. Reduced cost

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Free your office and server space - by 85%!



Tom Corey, Esq., "ROT or Not?",  
*Information Management Journal*,  
ARMA International, July/August 2017.

### 3. Reduced risk

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**\$1.08 million**

Average cost of a data breach (public sector)

**231 days**

Average time to detect a breach (public sector)

*Cost of a Data Breach Report 2020, IBM Security, 2020. Accessed 5 February 2021.*  
<https://www.ibm.com/security/digital-assets/cost-data-breach-report/#/pdf>



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### 3. Reduced risk

“The retention schedule helps organizations throw out the proper pallets at the proper time and prove the propriety of doing so to anyone who questions them about it.”

John C. Montaña, “What a Records Retention Schedule Is – and Why You Need One”, *Information Management Journal*, Arma International, March/April 2016



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## 4. Increased transparency







Richard Curtis

My dad's graduation class 😊 we've never seen that.  
Thank you for posting the link.



Denise Marie

**Diane Aagard** I found our grandpa Andrew Aagard's birth certificate in the database. Getting out now. I could spend the whole night digging through this site!



Alex Grover · Utah History

17h · 🌐

Thank you Utah State Archives!

Ronald Kirby

These are great pictures! We are always looking for old pictures to hang in our new police station. Please let us know if anyone has old pictures or memorabilia to share. If anyone is interested in the pictures hanging on our walls please give us a call at the PD. — Chief Ron Kirby

Love · Reply · Message · 2d



Steve Elton

Thats pretty cool, found mine....



[Show Attachment](#)



2 Comments 3 Shares



Like



Comment



Share



Melody Bell

WOW, that's awesome 👍

Like · Reply · Share · 14h



Margie Benson

I was able to obtain my great grandfather location in Elko Nevada by these means. Our family still has the irons.

Like · Reply · Share · 12h





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**= Business Case**



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## 6. Legal requirements

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Requirements found in Public Records Management Act ([Utah Code 63A-12-103](#)) for:

- Agencies
- Chief administrative officers
- Records officers

[Utah Code 63A-12-103](#)

Also see "[Baseline compliance checklist](#)" by Rosemary Cundiff



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## 6. Legal requirements— Chief Administrative Officer (CAO)

- Establish records management program
- Appoint records officer(s)
- Ensure that they certify annually

[Utah Code 63A-12-103](#)

Also see "[Baseline compliance checklist](#)" by Rosemary Cundiff



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## 6. Legal requirements - records officer

- Care and Maintenance
- Scheduling and Disposal
- Classification and Designation
- Providing access
- Preservation
- Point of contact for working with State Archives



[Utah Code 63A-12-103](#)

Also see "[Baseline compliance checklist](#)" by Rosemary Cundiff



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## 6. Legal requirements - records officer

- Annual certification - every records officer (almost)
- Utah Code 63G-2-108

Records Officer Certification

GRAMA Requests Training Agency

← Training

Certification Information for Amy Hamilton


 Your current status: **CERTIFIED**  
Annual renewal due: **FEBRUARY 4, 2022**

Records Officer Certification

GRAMA Requests Training Agency

← Records Officer Dashboard

Certification Information for Amy Hamilton

 Your current status: **EXPIRED**  
Annual renewal due: **JANUARY 8, 2016**



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# There are 2 ways to certify

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## Records Access

- GRAMA
- Classifying records
- Responding to GRAMA requests appropriately

## Records Management

- PRMA and GRAMA
- Understanding records
- Implementing retention schedules

You only need to pass one test each year in order to certify.



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**= Business Case**



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# Case Study

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## Incalculable



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# How long did the certification test take?

- A. Less than an hour
- B. 1–2 hours
- C. 2+ hours
- D. Too long!
- E. I haven't taken the test



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# What is a record?



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# Record—Legal Definition

(22) (a) "Record" means a book, letter, document, paper, map, plan, photograph, film, card, tape, recording, electronic data, or other documentary material **regardless of physical form or characteristics**:

- (i) that is **prepared, owned, received, or retained** by a governmental entity or political subdivision; and
- (ii) where all of the information in the original is **reproducible** by photocopy or other mechanical or electronic means.

[Utah Code 63G-2-103](#)



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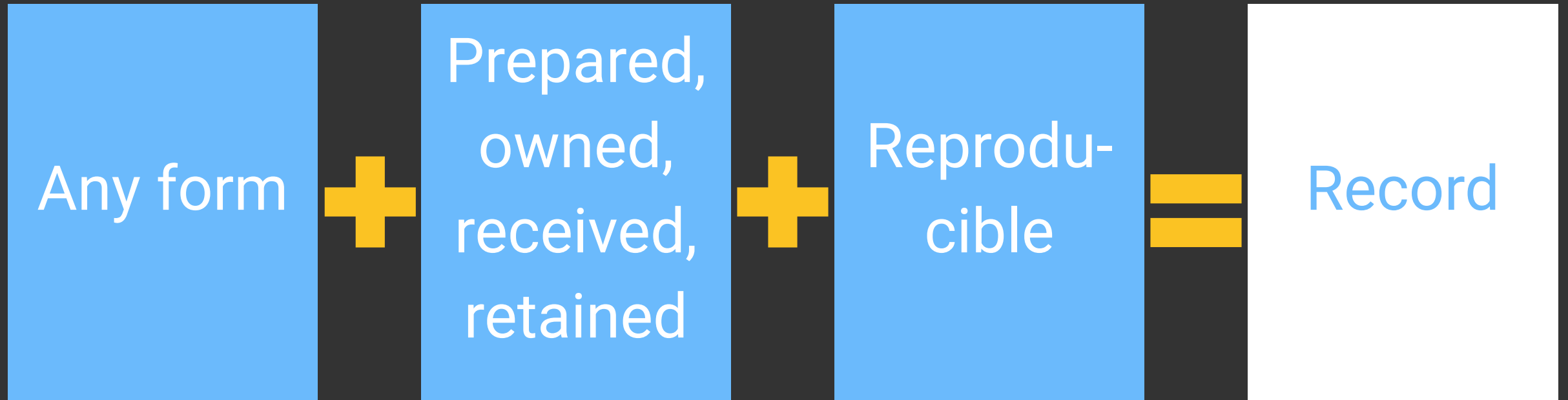
[Utah Code 63G-2-103](#)



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# Record—Legal Definition

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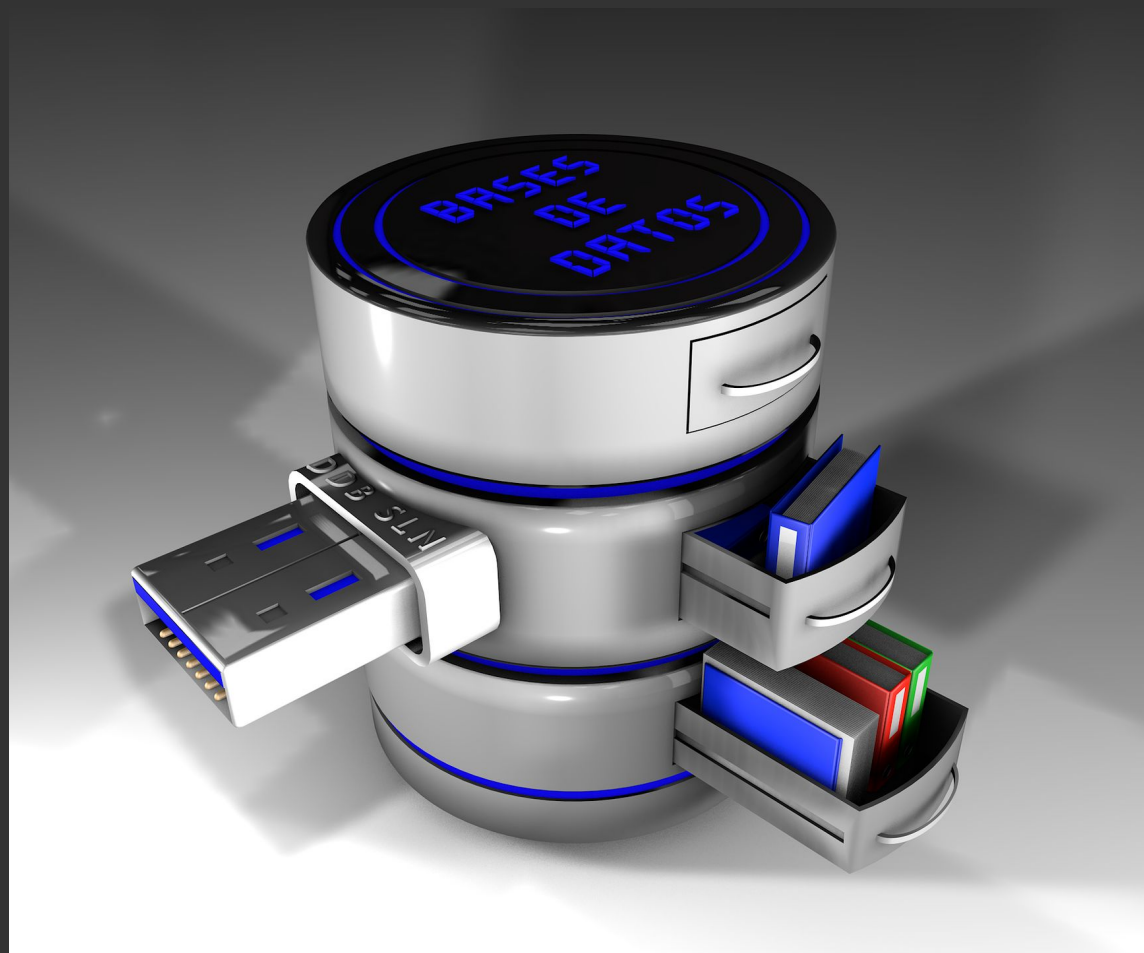
- # Utah Code 63G-2-103



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# Records Examples: Databases

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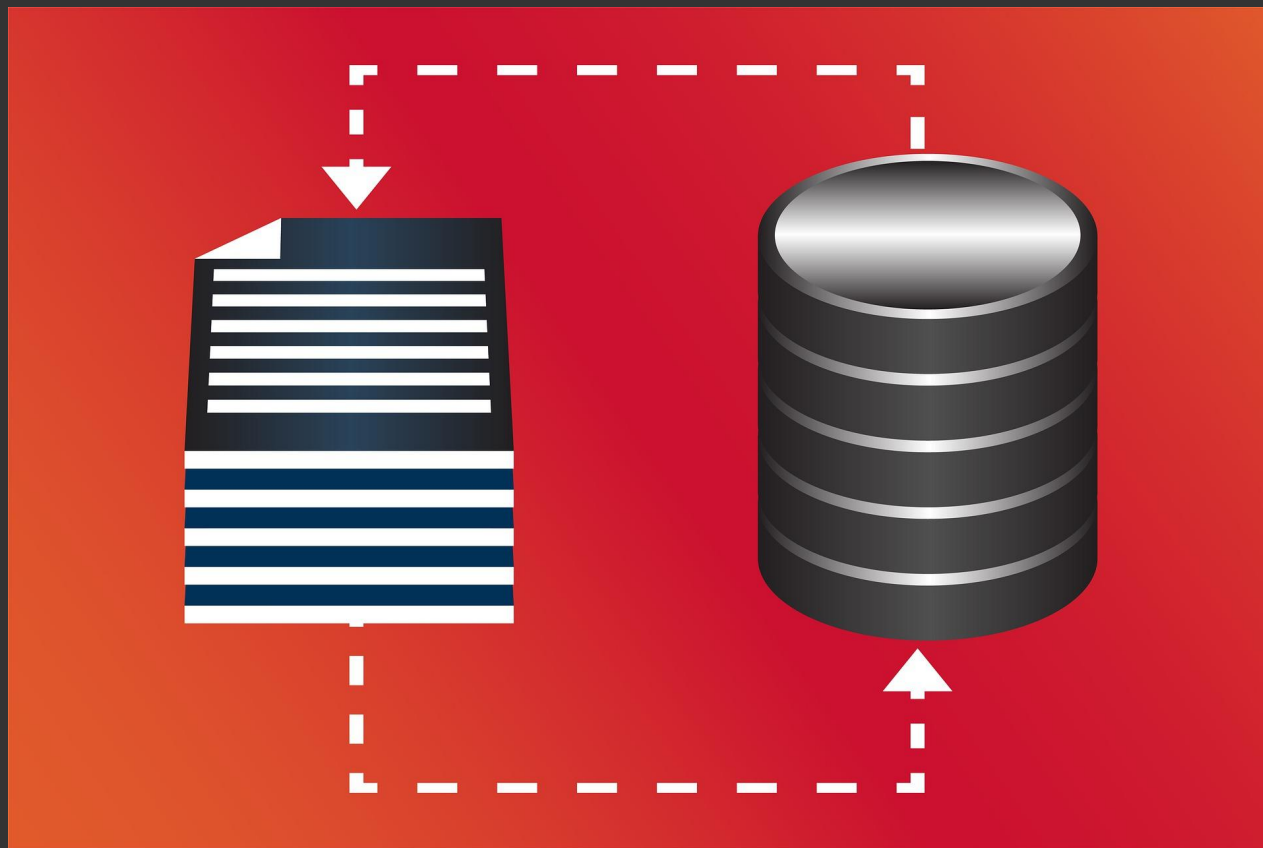
The database is not a government record, but contains government records



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# Records Examples: Databases

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Your database  
provides structure for  
the records it holds.



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# Examples of Non-records

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- Personal emails and documents that are not work-related
- Temporary drafts created for personal (work) use
- Books contained in a library
- Junk mail or spam
- Computer programs

[Utah Code 63G-2-103](#)



# Temporary Drafts: Not a Record If...

- It's temporary
- It's created for government employee's (work-related) personal use



Image courtesy #WOCinTechChat

[Utah Code 63G-2-103\(22\)\(b\)\(ii\)](#)

Also see "[Classifying Drafts](#)" by Rosemary Cundiff



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# Drafts: Yes a (Public) Record If...

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- It was circulated to anyone outside of the government entity
- It was not finalized but was relied upon to carry out an action or policy
- It contains empirical data and that data is not reasonably available elsewhere in similar form

[Utah Code 63G-2-301\(3\)\(i,j,k\)](#)



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# Is it a record?

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## Meeting request



RIM Specialists (Analysts)/ARO correspondence x



**Nicole Vawdrey** <nicolevawdrey@... Thu, Jan 23, 9:38 AM  
to me ▾



Renee,

We just  
questi  
meet



**Renee Wilson** <reneewilson@uta... Jan 23, 2020, 9:57 AM  
to Nicole ▾



**Nicole Vawdrey** <nicolevawdrey... Thu, Jan 23, 10:18 AM  
to me ▾



How about W



**Renee Wilson** <reneewilson@ut... Jan 23, 2020, 10:20 AM  
to Nicole ▾



Sounds great.


Thanks!


# Is it a record?


- A. Yes
- B. No
- C. Not sure


Meeting request

RIM Specialists (Analysts)/ARO correspondence x

 **Nicole Vawdrey** <nicolevawdrey@... Thu, Jan 23, 9:38 AM ☆ ↩ ⋮  
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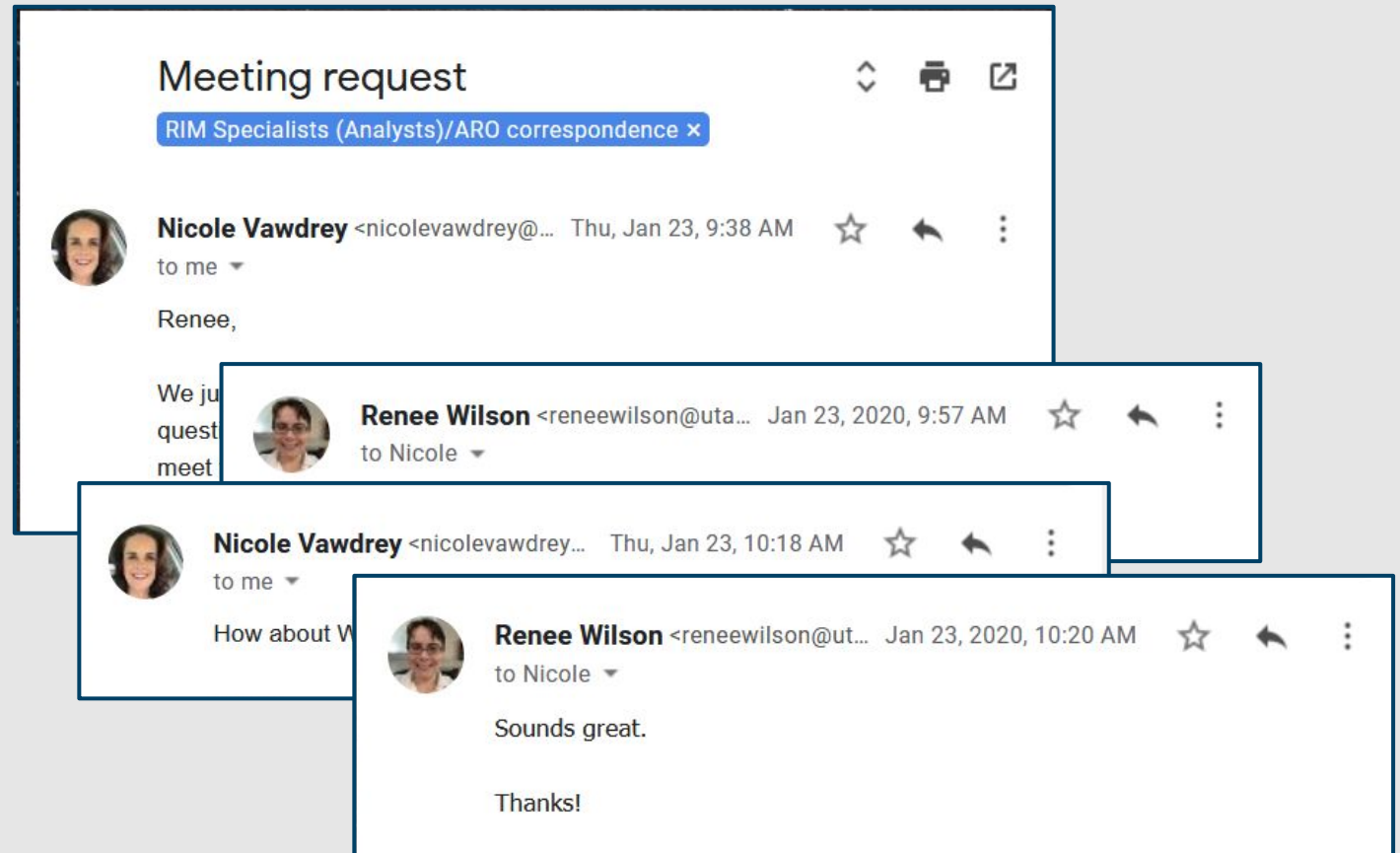
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B. No

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It's back to school season and we were curious what a course of study looked like back in the day. We pulled up Series 28730, which is the Hamilton School Administrative Records, and found this schedule from 1901! It outlines the classes a student would take at Salt Lake City High School throughout their four years. The courses are split into one of four categories: classical, scientific, English, and commercial. Does it look similar to high school student schedules in the 21st century?

SALT LAKE CITY HIGH SCHOOL.				
OUTLINE OF COURSE OF STUDY.				
	CLASSICAL COURSE.	SCIENTIFIC COURSE.	ENGLISH COURSE.	COMMERCIAL COURSE.
First Year.	1st half. <div>           I. Latin, 5.            I. Algebra, 4.            I. English Grammar, 5.            I. Composition, 5.            I. Physiology, 2.            or            I. Zoology, 2.           </div>	17 <div>           I. Zoology, 5.            I. Algebra, 5.            I. English Grammar, 5.            I. Composition, 5.            I. General History, 2.           </div>	17 <div>           I. English Grammar, 5.            I. Composition, 5.            I. Algebra, 5.            I. General History, 5.            I. Physiology, 2.           </div>	17 <div>           I. English Grammar, 5.            I. Composition, 5.            I. Commercial Arithmetic, 5.            I. Stenography, 5.            I. Penmanship and Typewriting, 5.           </div>
	2nd half. <div>           Same as above.           </div>	<div>           Same as above except            I. Botany, 5.            for            I. Zoology, 5.           </div>	<div>           Same as above.           </div>	<div>           Same as above except            I. Book-keeping, 5.            for            I. Commercial Arithmetic, 5.           </div>
Second Year.	1st half. <div>           II. Latin, 5.            I. Greek or German or French, 5.            I. Plane Geometry, 5.            II. English Composition, 5.           </div>	18 <div>           I. Physiology, 5.            I. Latin or German or French, 5.            I. Plane Geometry, 5.            II. English Composition, 5.           </div>	17 <div>           I. English Grammar, 5.            I. Rhetoric, 5.            I. Composition, 5.            I. Plane Geometry, 5.            I. French or German, 5.            I. Physiology, 2.           </div>	20 <div>           I. English Grammar, 5.            I. Composition, 5.            I. Spelling, 5.            I. Form, 5.            II. Book-keeping, 5.            II. Stenography and Typewriting, 5.            I. Business Practice, 5.           </div>
	2nd half. <div>           Same as above.           </div>	<div>           Same as above except            I. Zoology, 5.            for            I. Physiology, 5.           </div>	<div>           Same as above.           </div>	<div>           Same as above except            I. Commercial Law, 5.            for            I. Business Practice, 5.           </div>
Third Year.	1st half. <div>           III. Latin, 5.            II. Greek or German or French, 5.            I. Algebra, 5.            I. English History, 5.            III. English Composition, 5.           </div>	18 <div>           I. Physics, 5.            II. Latin or German or French, 5.            II. Algebra and I. Solid Geometry, 5.            I. English Hist. and I. U. S. Hist.            III. English Composition, 5.           </div>	17 <div>           I. English Literature, 5.            I. Rhetoric, 5.            I. French or German, 5.            I. English and U. S. History, 5.            I. Physiology, 5.           </div>	17 <div>           I. English Literature, 5.            I. Rhetoric, 5.            I. French or German, 5.            I. English and U. S. History, 5.            I. Physiology, 5.           </div>
	2nd half. <div>           Same as above except            I. Roman History, 5.            for            I. Greek History, 5.           </div>	<div>           Same as above.           </div>	<div>           Same as above.           </div>	
Fourth Year.	1st half. <div>           IV. Latin, 5.            III. Greek or German or French, 5.            I. Plane Trigonometry, 5.            I. Chemistry, 5.           </div>	18 <div>           I. Chemistry, 5.            III. Latin or German or French, 5.            I. Plane Trigonometry, 5.            I. Civil Government, 5.           </div>	17 <div>           IV. English Literature, 5.            I. Rhetoric, 5.            I. French or German, 5.            I. English and U. S. History, 5.            I. Physiology, 5.           </div>	17 <div>           IV. English Literature, 5.            I. Rhetoric, 5.            I. French or German, 5.            I. English and U. S. History, 5.            I. Physiology, 5.           </div>



Jim Kichas  
Civics and History courses as part of the scientific core curriculum!? Sign me up!

3d Like Reply

2 👍❤️



Mary Price  
Did Hamilton School teach High School courses?

4d Like Reply

1 👍




Author  
Utah State Archives and Records Service  
Good question! Hamilton was an elementary school but it looks like this particular record book contained a mixture of records, including the course guide for the neighboring high school.

4d Like Reply

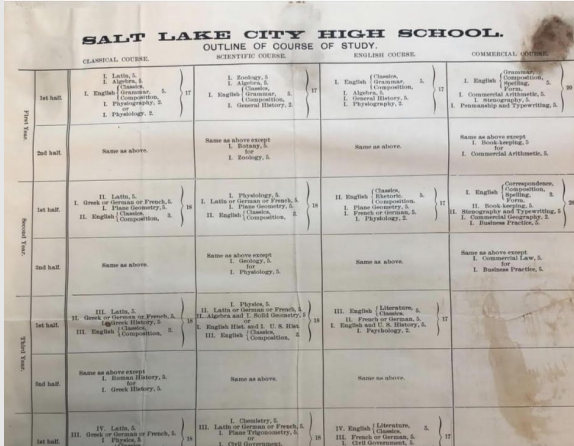
2 👍


# Is it a record?


- A. Yes
- B. No
- C. Not sure


**Utah State Archives and Records Service**  
4d · 🌐


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3d Like Reply 2 🍌❤️

**Mary Price**  
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4d Like Reply 1 🍌

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4d Like Reply 2 🍌




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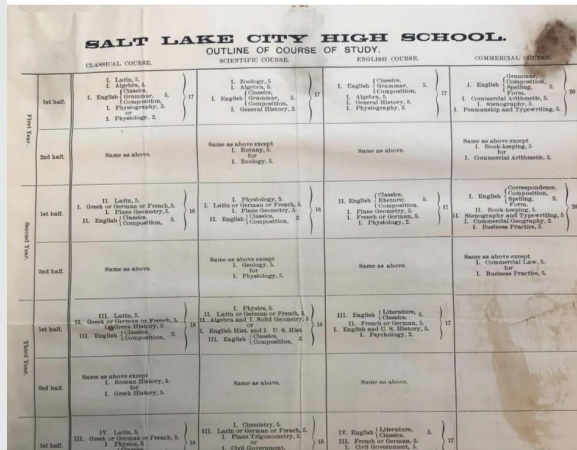
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## In the Loop for Wednesday, January 13, 2021

1 message

**SAA Headquarters** <saahq@archivists.org>

Reply-To: us3-47631ad79f-e3560ef1c4@inbound.mailchimpapp.net

To: Renee Wilson <reneewilson@utah.gov>

Wed, Jan 13, 2021 at 6:01 AM

Save 40% on Online Education  
Courses through January 15

January 13, 2021

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### 2021 Conference Program Proposals Due Today!

Submit a program proposal for *ARCHIVES\*RECORDS 2021*! The conference's theme is "Together/Apart," and the 2021 Program Committee invites proposals for sessions to be presented virtually during July 31–August 7. As you develop proposals, consider themes of:

- Reimagining and Redefining the Workplace
- Person-Centered Management and Leadership Practices
- Re-envisioning Archival Practices
- Building Community and Sustaining Relationships
- Conscious Editing and Reparative Work

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- Conscious Editing and Reparative Work

# Getting started



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# You are...

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- Inheriting a mess of boxes and files
- Updating your retention schedules
- Cleaning up the shared drive
- Moving buildings

Where do you start?



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# Where to start?

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1. Do a records inventory
2. Check existing RIM governance records
3. Diagram agency functions to identify resulting records
4. Identify your team



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# 1. Do a Records Inventory



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# Questions to answer

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- What are they?
- Whose are they?
- Why are they? Why do they exist?
- When were they created?
- How are they now used?
- How many are there? Are there duplicates? and
- Where are they stored?
- Can we read the files? How do we delete them?





# A Record Series is a Group of Records

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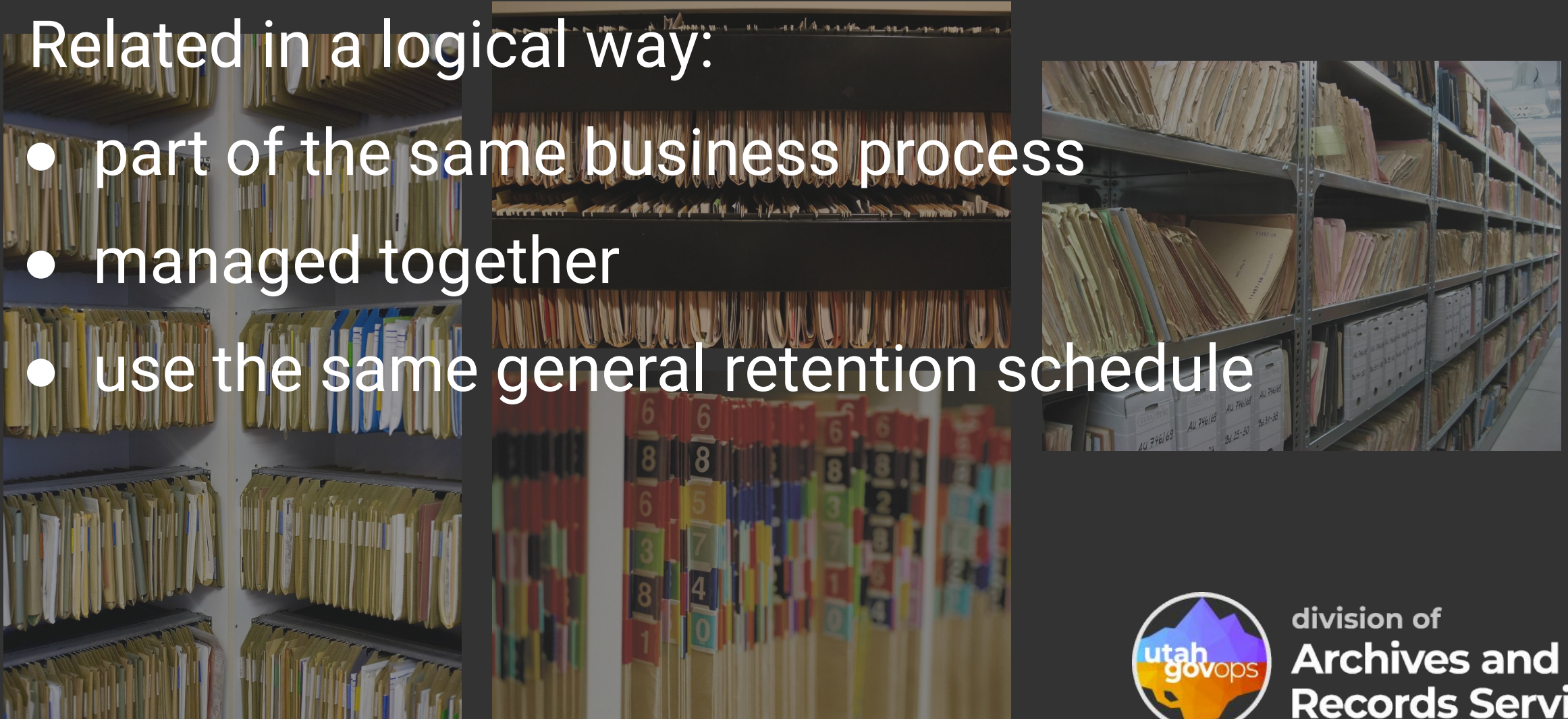
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# A Record Series is a Group of Records

Related in a logical way:

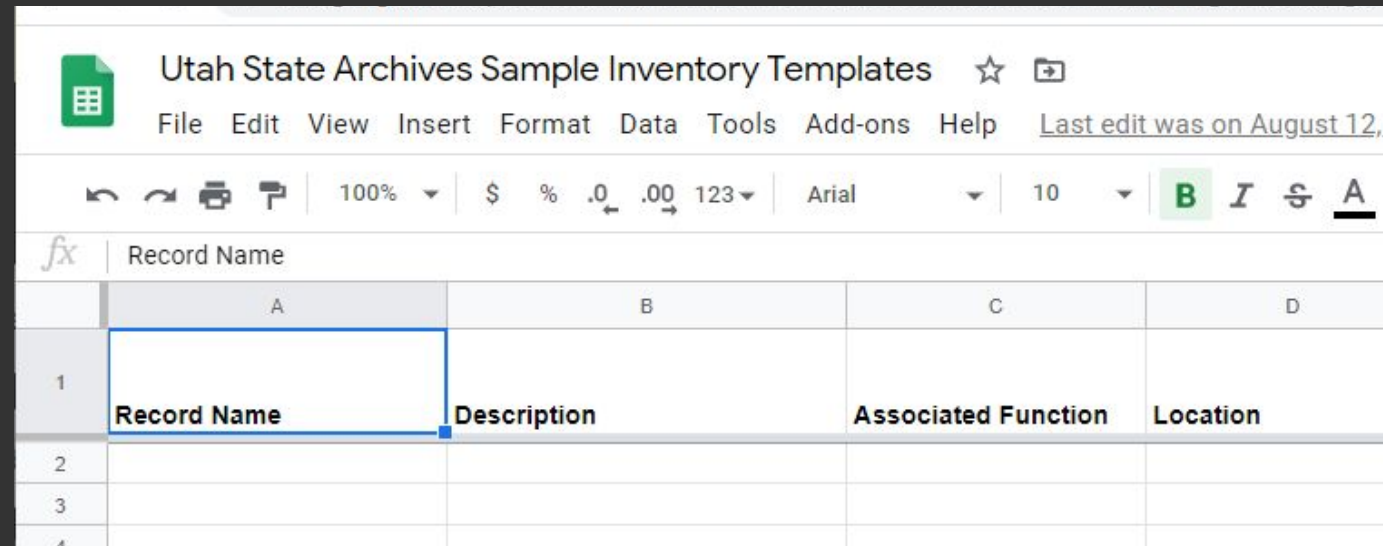
- part of the same business process
- managed together
- use the same general retention schedule



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# Inventory form basics

- Record series title
- Approved retention, disposition
- GRAMA designation
- Location
- How it's stored
- Media/file format



Utah State Archives Sample Inventory Templates				
File Edit View Insert Format Data Tools Add-ons Help				
100% \$ % .0 .00 123 Arial 10 B I S A				
Record Name				
	A	B	C	D
1	Record Name	Description	Associated Function	Location
2				
3				
4				

<https://bit.ly/3nsuMUN>



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Records Service**

## Records & Information Management (RIM) Electronic Records Survey/Interview Findings

### **Records Series Name: GRAMA Requests Tracking**

#### Records Purpose and Workflow Findings

<i>Data Item</i>	<i>Answers/Details</i>
Records Format(s)	<ul style="list-style-type: none"> <li>Electronic database (master copy)</li> <li>No duplicate copies are filed (any paper printouts &amp; e-mailed documents are discarded once immediate usage has expired, and no e-docs are saved on the network)</li> </ul>
Records Purpose/Function	<ul style="list-style-type: none"> <li>Used to track GRAMA requests for information</li> <li>The database on which these records are stored generates reports and assigns request numbers; it also contains key information on request type, request source, request received date, request summary, whether fees have been paid, response due date, etc.</li> <li>This information is used to calculate time allowed to process requests, whether extra time may be allotted to process the request itself, and all other time, money, and related reporting matters associated with processing GRAMA requests</li> </ul>
Records Status (vital, important, useful, non-important)	<ul style="list-style-type: none"> <li>Useful</li> </ul>
Records Value (Historical or not)	<ul style="list-style-type: none"> <li>Not Historical</li> </ul>
Administrative/Operational	<ul style="list-style-type: none"> <li>Administrative</li> </ul>
Master Copy of record been altered (e.g., digitally scanned)?	<ul style="list-style-type: none"> <li>No</li> </ul>
Personal/Confidential Information	<ul style="list-style-type: none"> <li>Yes</li> </ul>
Access Permissions/Restrictions	<ul style="list-style-type: none"> <li>Access to the database is restricted to GRAMA Coordinators</li> <li>Although all government departments use the GRAMA database, GRAMA Coordinators may only view their</li> </ul>

<i>Data Item</i>	<i>Answers/Details</i>
	<ul style="list-style-type: none"> <li>4. The GRAMA database is also used to generate weekly reports for the departments, with these reports being sent out weekly via e-mail to relevant directors</li> </ul>
Other Comments	<ul style="list-style-type: none"> <li>This type of record is not exclusive to this particular department (i.e., common across the government)</li> </ul>
Operational Retention Requirements	<ul style="list-style-type: none"> <li>Once the GRAMA request has been fully processed, and the time period for complaints has expired, we typically never need to access these records again</li> </ul>

#### Technology Findings

<i>Data Item</i>	<i>Answers/Details</i>
Technology Name	<ul style="list-style-type: none"> <li>Government Records Access and Management Act (GRAMA) database</li> </ul>
Types of Data Fields	<ul style="list-style-type: none"> <li>Information about the request itself, information about the requestor (e.g., address, etc.), action items to take on the request, exceptions to releasing information (space allocated to quote sections from GRAMA)</li> <li>Also information about status (e.g., number of days required to process request, etc.), review information, general remarks, and reports (i.e., weekly &amp; yearly statistics for the department)</li> </ul>
Volume of Data	<ul style="list-style-type: none"> <li>Roughly 3.5 gigabytes (GB)</li> </ul>
Estimated Storage Capacity	<ul style="list-style-type: none"> <li>Roughly 10 gigabytes (GB)</li> </ul>
Anticipated Changes	<ul style="list-style-type: none"> <li>N/A</li> </ul>
Network Connection Clients	<ul style="list-style-type: none"> <li>No third party access</li> <li>Designated staff cannot access database outside the office.</li> </ul>
Audit Trail	<ul style="list-style-type: none"> <li>Standard</li> </ul>
Security Practices	<ul style="list-style-type: none"> <li>Standard (and no external access)</li> </ul>
Date Range of Records	<ul style="list-style-type: none"> <li>2012 to present (no data moved off-line to date)</li> </ul>



- Amount/volume
- Date range
- Quality (esp. if digitized or aged)
- Location environment
- Workflow involved
- Security & accessibility
- Copies: record, duplicate
- Copies: paper, digital
- Originating office
- Legal requirements
- Appraisal value & operational need

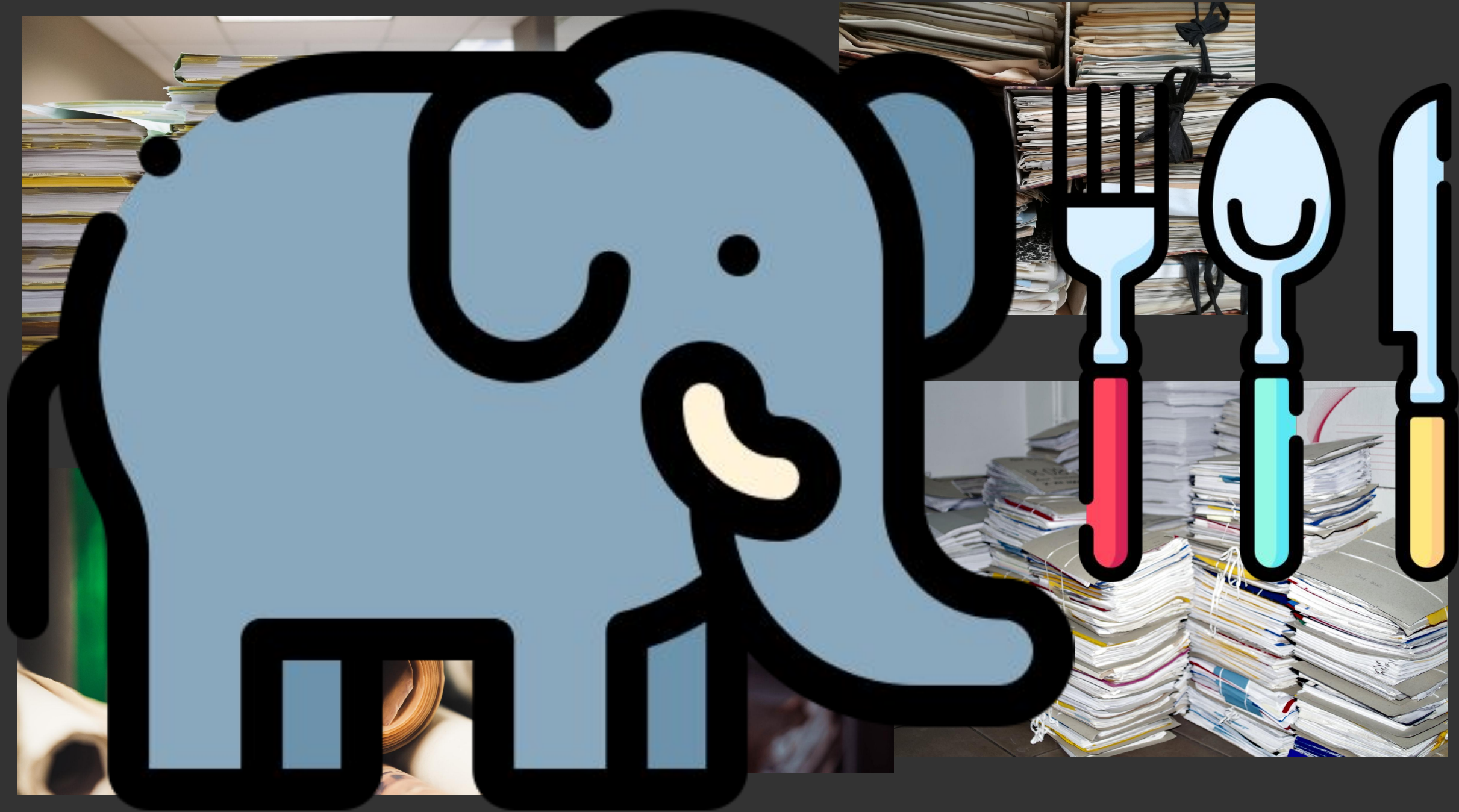
Data Item	Answers/Details
	4. The GRAMA database is also used to generate weekly reports for the departments, with these reports being sent out weekly via e-mail to relevant directors
Other Comments	<ul style="list-style-type: none"> <li>This type of record is not exclusive to this particular department (i.e., common across the government)</li> </ul>
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Security Practices	<ul style="list-style-type: none"> <li>Standard (and not unique)</li> </ul>
Date Range of Records	<ul style="list-style-type: none"> <li>2012 to present (no data moved off-line to date)</li> </ul>



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# What to inventory first?

---

- By location (physical and/or digital)
- By type (hard copy, digital)
- By employee/section



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# Where to start?

---

1. **Do a records inventory**
2. Check existing RIM governance records
3. Diagram agency functions to identify resulting records
4. Identify your team



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# Is it a record?

---



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Boxes

Main

User Defined

Ext. Description

Files

Box Identifiers

Box Number

3276

User Box Number

2

Record Center ID

Barcode ID

%00003276

RFID

Location

Box Type

CUBIC FOOT BOX

Record Center

ARCHIVES

Aisle - Bay - Shelf

\_\_-\_\_-\_\_

Position

Alternate Location

D040A01

Space Management

Descriptive Information

Company

UTAH STATE ARCHIVES RECORDS CENTER

State

Inactive

Department

/00011/

Department of Administrative Services, Division of Archives and Recor

Record Series

07323-

Executive correspondence

Title

Description

Box 2  
Jacobsen, Privacy and Security Committee  
1982-1983

General

Additional

Retention

Destruction

Activity

Ranges

Creation

5/4/1995

Submitted By

Event

Label Type

< None >

Submit

2/13/1996

Disposition

CUSTODY

CUSTODY

Misc

From

1/1/1982

To

12/31/1983

☒ Label Printed

Search

Update

Delete

Add

Clear

Previous

Next

Itemize Files

Print Label

Options

Spell Check

Check Out

# Is it a record?

A. Yes

B. No

C. Not sure

The screenshot shows the 'Boxes' software interface with the following data:

Main	User Defined	Ext. Description	Files
<b>Box Identifiers</b>		<b>Location</b>	
Box Number: 3276		Box Type: CUBIC FOOT BOX	
User Box Number: 2		Record Center: ARCHIVES	
Record Center ID:		Aisle - Bay - Shelf:	Position:
Barcode ID: %00003276		Alternate Location: D040A01	Space Management
RFID:			
<b>Descriptive Information</b>			
Company: UTAH STATE ARCHIVES RECORDS CENTER		State: Inactive	
Department: /00011/		Department of Administrative Services, Division of Archives and Recor	
Record Series: 07323-		Executive correspondence	
Title:			
Description: Box 2 Jacobsen: Privacy and Security Committee 1982-1983			
<b>General</b>   Additional   Retention   Destruction   Activity   Ranges			
Creation: 5/4/1995	Submitted By:		
Event:	Label Type:	< None >	
Submit: 2/13/1996	Disposition: CUSTODY	CUSTODY	
Misc:			
From: 1/1/1982			
To: 12/31/1983	<input checked="" type="checkbox"/> Label Printed		

On the right side of the interface, there is a vertical toolbar with the following buttons: Search, Update, Delete, Add, Clear, Previous, Next, Itemize Files, Print Label, Options, Spell Check, and Check Out.

# Is it a record?

**A. Yes**

B. No

C. Not sure

The screenshot shows the 'Boxes' software interface with the following data entered:

Main		User Defined		Ext. Description		Files	
<b>Box Identifiers</b>							
Box Number	3276			Location			
User Box Number	2			Box Type	CUBIC FOOT BOX		
Record Center ID				Record Center	ARCHIVES		
Barcode ID	%00003276			Aisle - Bay - Shelf		Position	
RFID				Alternate Location	D040A01	Space Management	
<b>Descriptive Information</b>							
Company	UTAH STATE ARCHIVES RECORDS CENTER				State	Inactive	
Department	/00011/	Department of Administrative Services, Division of Archives and Recor					
Record Series	07323-	Executive correspondence					
Title							
Description	Box 2 Jacobsen: Privacy and Security Committee 1982-1983						
<b>General</b>							
Creation	5/4/1995	Submitted By					
Event		Label Type			< None >		
Submit	2/13/1996	Disposition	CUSTODY		CUSTODY		
Misc							
From	1/1/1982						
To	12/31/1983						

Buttons on the right side of the interface: Search, Update, Delete, Add, Clear, Previous, Next, Itemize Files, Print Label, Options, Spell Check, Check Out.



# THE AMERICAN ARCHIVIST

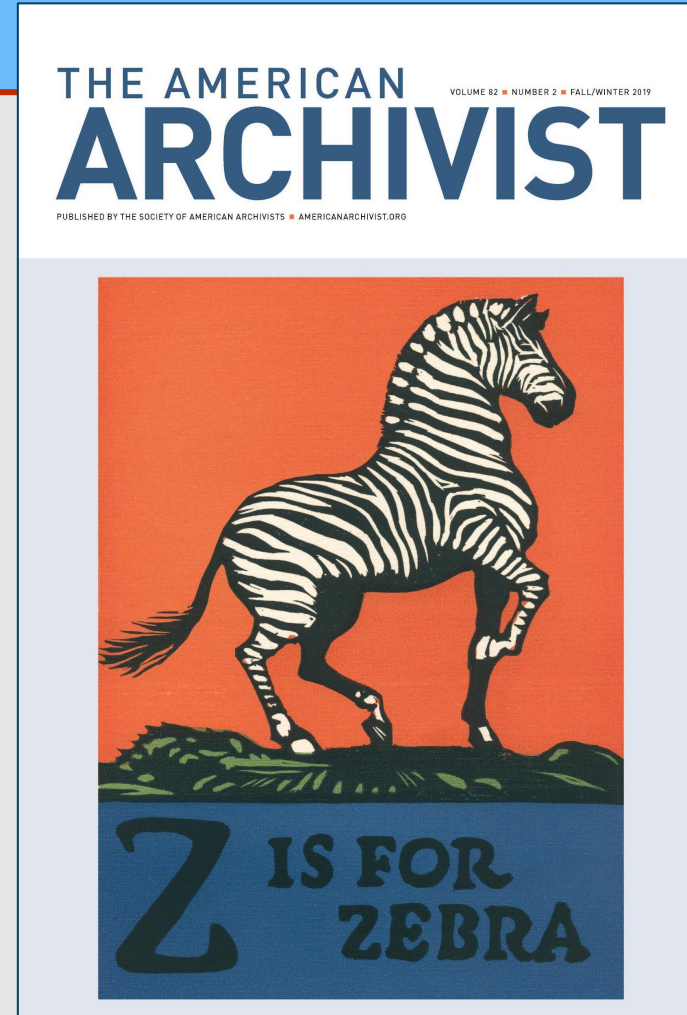
VOLUME 82 ■ NUMBER 2 ■ FALL/WINTER 2019

PUBLISHED BY THE SOCIETY OF AMERICAN ARCHIVISTS ■ AMERICANARCHIVIST.ORG



# Is it a record?

- A. Yes
- B. No
- C. Not sure

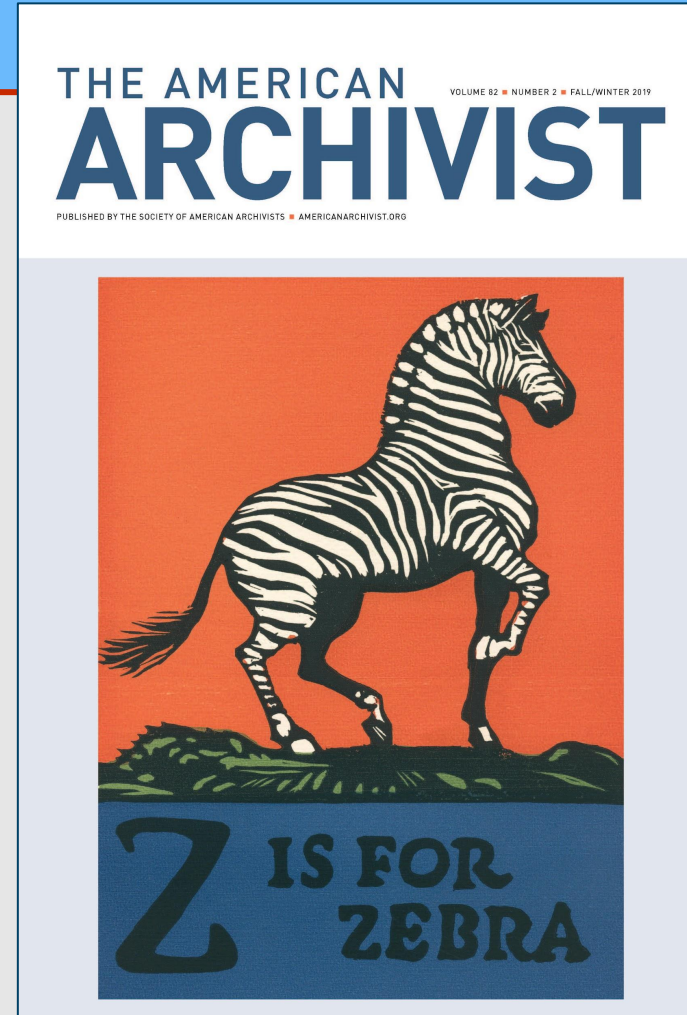


# Is it a record?

A. Yes

**B. No**

C. Not sure



Gina Strack - Mozilla Firefox

https://hangouts.google.com/webc...

Gina Strack  
Active 24m ago

I'm working out the command required on a copy  
Apparently no one does the whole directory to  
one page exactly

oh

Got it!  
Try <https://archives.utah.gov/rim/grs/cntgrs-4.html>

Hey, nice!

For future reference (all from googling btw)  
RewriteRule ^/?rim/grs/(.\*)\$  
<https://archives.utah.gov/rim/retention-schedules.html> [L,R=301]  
I guess it's just RegEx which I don't really know  
😊

Yeah, me neither!  
THANK YOU SO MUCH!

I also copied the code the Trello card (which thus far will be kept around) <https://trello.com/c/dWK9j4yS>

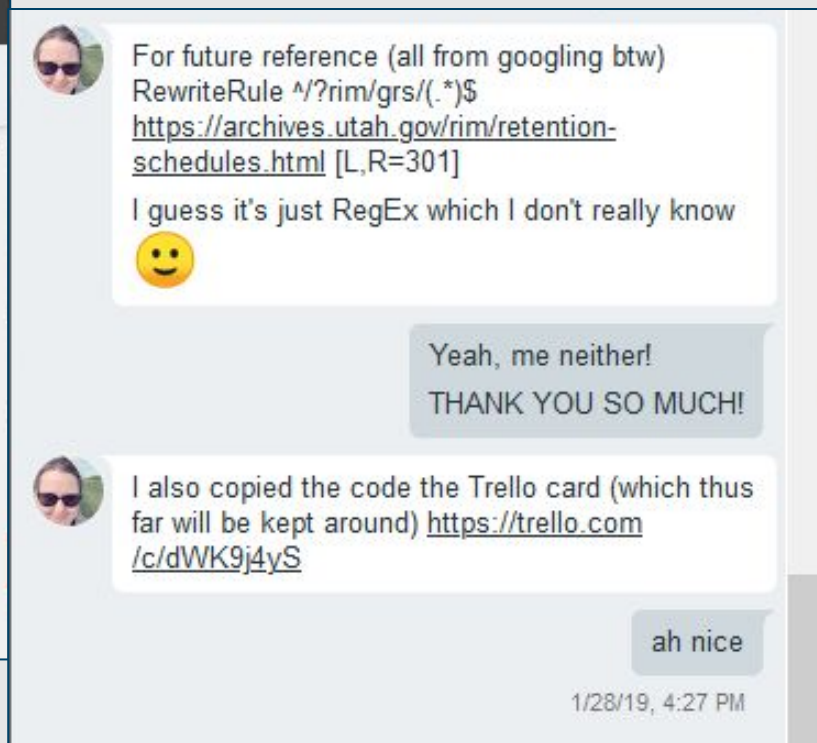
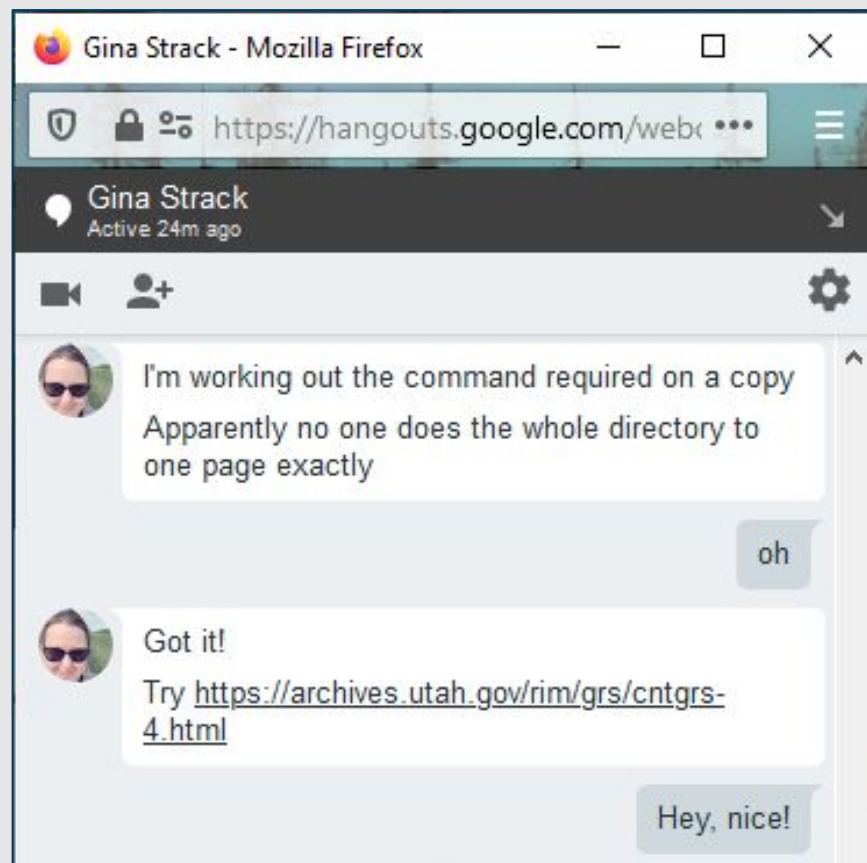
ah nice

1/28/19, 4:27 PM



# Is it a record?

- A. Yes
- B. No
- C. Not sure



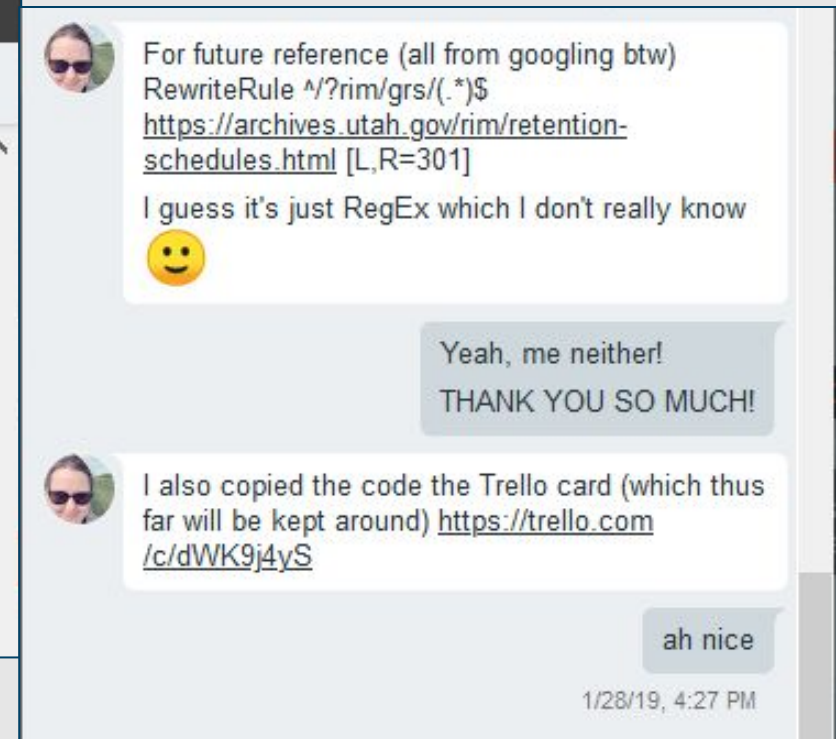
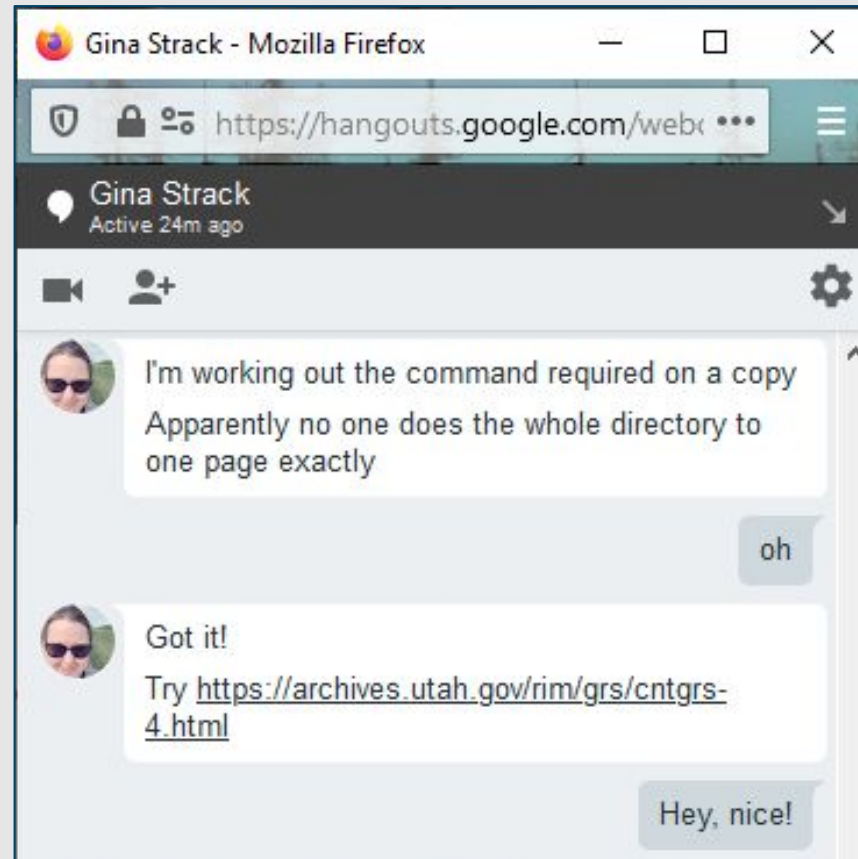


# Is it a record?

A. Yes

B. No

C. Not sure



# Do you have Bonnie's carrot cake recipe?



**Renee Wilson** <reneewilson@utah.gov>

to Marilyn ▾

Mon, Apr 26, 9:23 AM



Hi Marilyn!

Do you happen to have Bonnie's carrot cake recipe? I thought I had it, but I can't find it.

Thanks!

**Renée Wilson**

*RIM (Records and Information Management) Specialist, state agencies*



**Marilyn** [Redacted]

to me ▾

Apr 26, 2021, 9:00 PM



I'm sure I have it. Somewhere. I'll look for it and let you know.

MARILYN [Redacted]

[Redacted]  
[Redacted]  
[Redacted]  
[Redacted]

# Is it a record?

A. Yes

B. No

C. Not sure



# Is it a record?

A. Yes

B. No

C. Not sure



# Camp Kearns history



**Renee Wilson** <reneewilson@utah.gov>

May 14, 2021, 2:17 PM



to Marilyn ▼

Hi Marilyn!

It appears we don't actually have many records from Kearns. The most I can find is [one box of publications](#), but it's dated from 1959, so I'm not sure it would have anything about Camp Kearns.

It does look like the Utah State Historical Society has [a box of photographs from 1949-1950](#), which contains some photos of Camp Kearns. If you'd like me to see if I can recall that box for you to look at, I can look into that (we share a Research Center with the Division of History).

What you'll probably find the most helpful is [Pam Todd's Camp Kearns website](#). Pam Todd ([LinkedIn](#)) founded the Kearns Historical Society in 1998, and she appears to be the force behind any catalogued history or artifacts from Camp Kearns.

The only other resources I could find were a couple news stories about Camp Kearns, or about Pam Todd's efforts to find a building to use as a museum for the artifacts she's collected:



# Is it a record?

A. Yes

B. No

C. Not sure

## Camp Kearns history



**Renee Wilson** <reneewilson@utah.gov> May 14, 2021, 2:17 PM     
to Marilyn ▾

Hi Marilyn!

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# Is it a record?




A. Yes

B. No

C. Not sure

## Camp Kearns history



**Renee Wilson** <reneewilson@utah.gov> May 14, 2021, 2:17 PM     
to Marilyn ▾

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The only other resources I could find were a couple news stories about Camp Kearns, or about Pam Todd's efforts to find a building to use as a museum for the artifacts she's collected:





Take a deep  
breath  
Do what you can



## 2. Check Existing RIM Governance Records



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Image courtesy #WOCinTechChat

# RIM Governance Records

---

- Any inventories, transfer sheets, retention schedules from previous people
- Archives website  
[archives.utah.gov/rim/retention-schedules.html](https://archives.utah.gov/rim/retention-schedules.html)
- State Records Center box report



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# Where to start?

---

1. Do a records inventory
- 2. Check existing RIM governance records**
3. Diagram agency functions to identify resulting records
4. Identify your team



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# Is it a record?

---



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LK

Lauren >

Monday 12:30

Woohoo! I am not. Box is at my desk though, can't miss it. 😊

Yay thanks!

Monday 17:29

How'd it go?

Good! I ended up staying all day 😂 I got a great scan of a letterhead and program packet so I'll use them soon!!! Thank you so much for thinking of me!!

Hooray! I'm so glad to hear that. 😊

I def think we should hire a goat for our next staff meeting. 😏



**Covid: 'Insane' success of goat Zooms nets Rossendale farm £50k**

bbc.com

Ken says it's the best idea ever 😂

BAHAHAHA

Pun intended 😏

# 15. Is it a record?

- A. Yes
- B. No
- C. Not sure





# 15. Is it a record?

A. Yes

B. No

C. Not sure



# 3. Diagram Agency Functions & Resulting Records



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Image courtesy #WOCinTechChat



# Agency functions

Government entities exist to carry out the public's business



# Understanding Functions

---

## Common administrative functions

- Human Resources
- Budgeting
- Policy creation
- Accounts Payable and Receivable

## Unique business functions

- Mosquito abatement
- Safety inspection
- Medicaid eligibility screening
- Oversee horse races
- Facilitate economic development in the state



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# Deriving records from functions

---

Function mandated of your agency



Process used to fulfill that function



Records created/retained as part of that process



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# Functions found in statute or ordinances

- Division of Archives and Records Service:

**Index Utah Code**

**Title 63A Utah Government Operations Code**

**Chapter 12 Division of Archives and Records Service**

**Part 1 General Provisions**

**Section 101 Division of Archives and Records Service created -- Duties. *(Effective 7/1/2021)***

- (e) establish standards for the preparation of schedules providing for the retention of records of continuing value and for the prompt and orderly disposal of state records no longer possessing sufficient administrative, historical, legal, or fiscal value to warrant further retention;
- (k) provide assistance to any governmental entity in administering this chapter and Title 63G, Chapter 2, Government Records Access and Management Act;



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# Functions found in statute or ordinances

- All governmental entities:

**Index Utah Code**

**Title 63A Utah Government Operations Code**

**Chapter 12 Division of Archives and Records Service**

**Part 1 General Provisions**

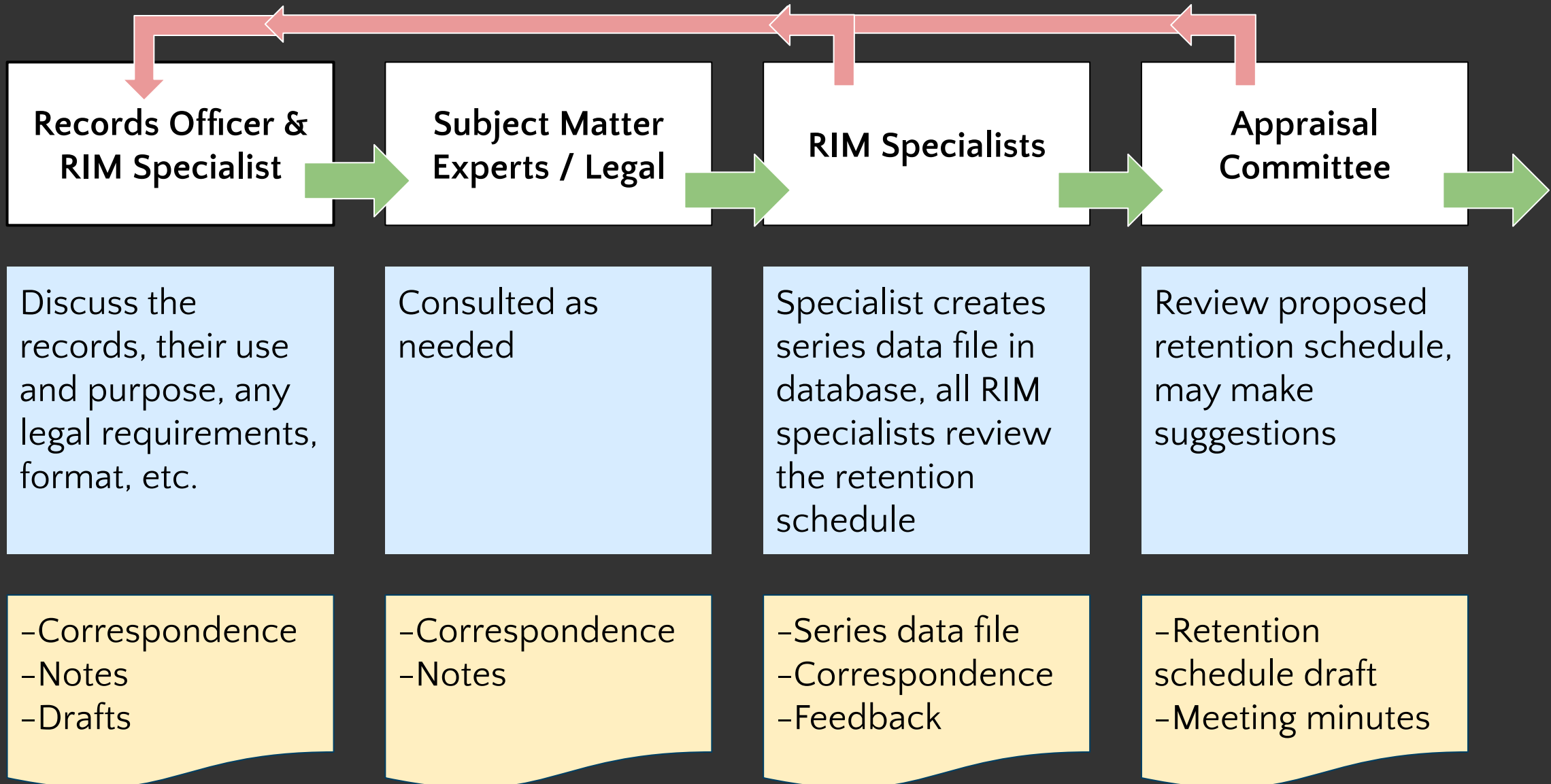
**Section 103 Duties of governmental entities. *(Effective 7/1/2021)***

- (2) appoint one or more records officers who will be trained to work with the state archives in the care, maintenance, scheduling, disposal, classification, designation, access, and preservation of records;
- (5) submit to the state archivist proposed schedules of records for final approval by the Records Management Committee created in Section 63A-12-112;



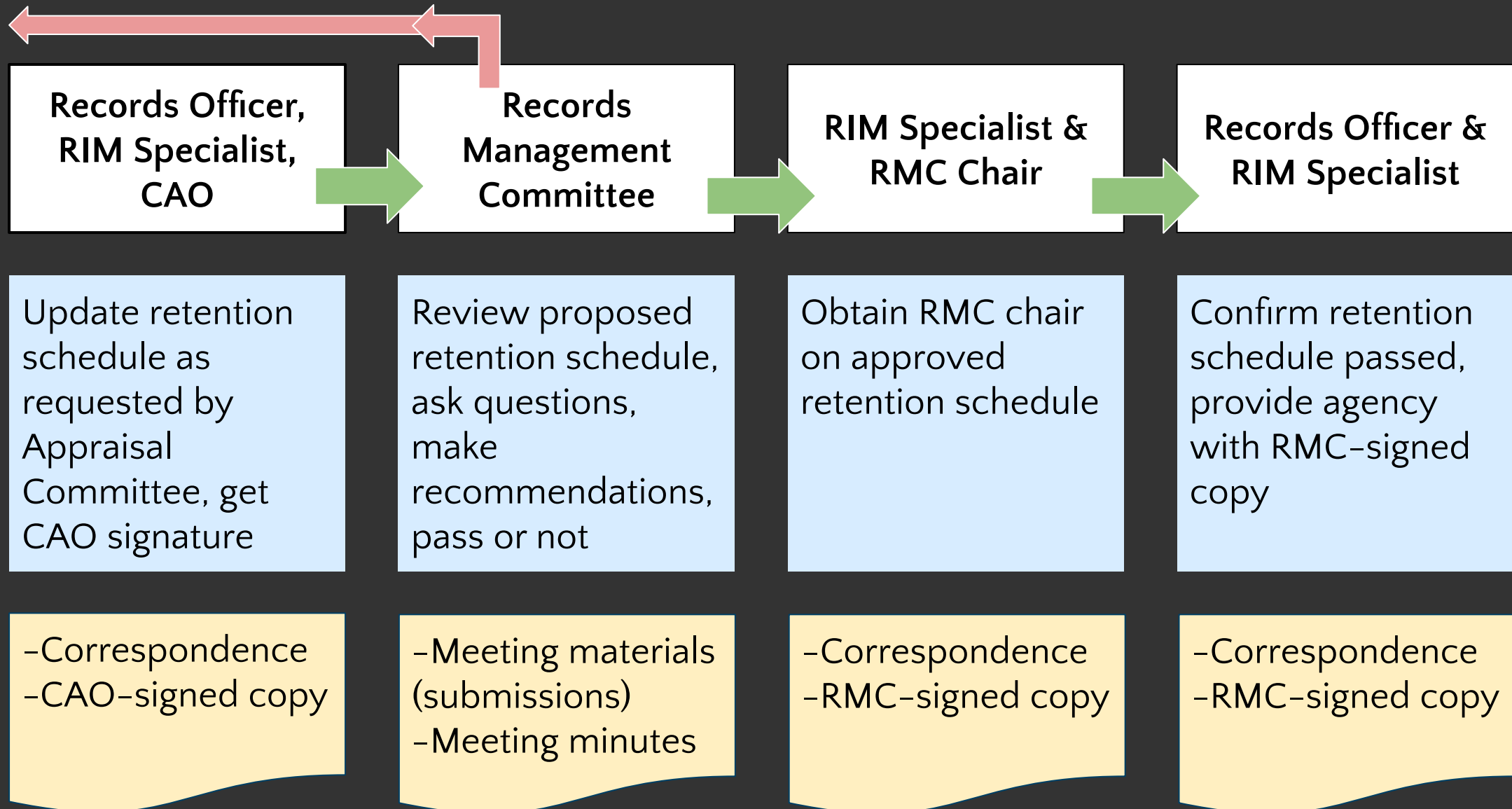
division of  
**Archives and  
Records Service**

# Creating a retention schedule (1 of 2)

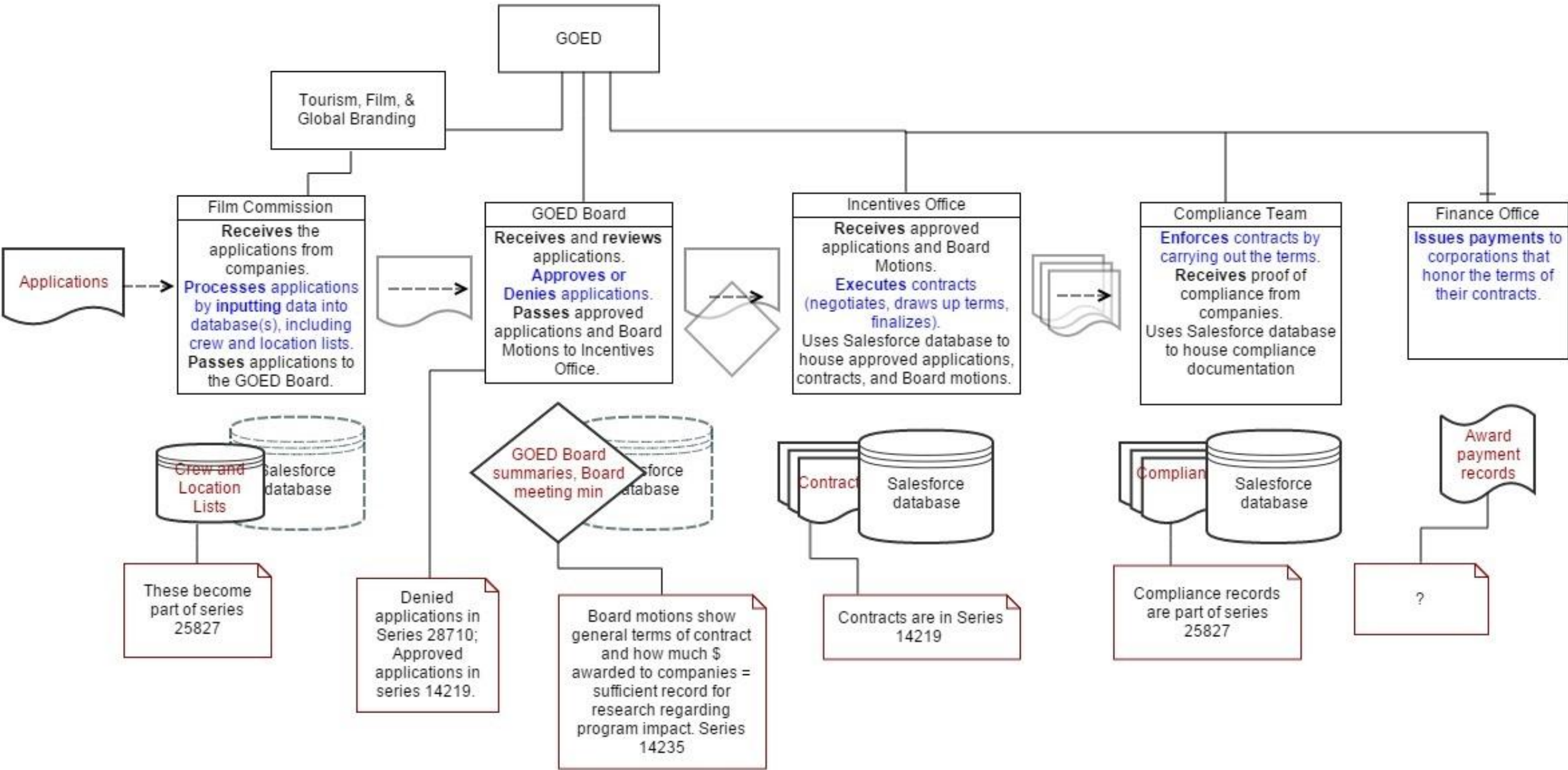




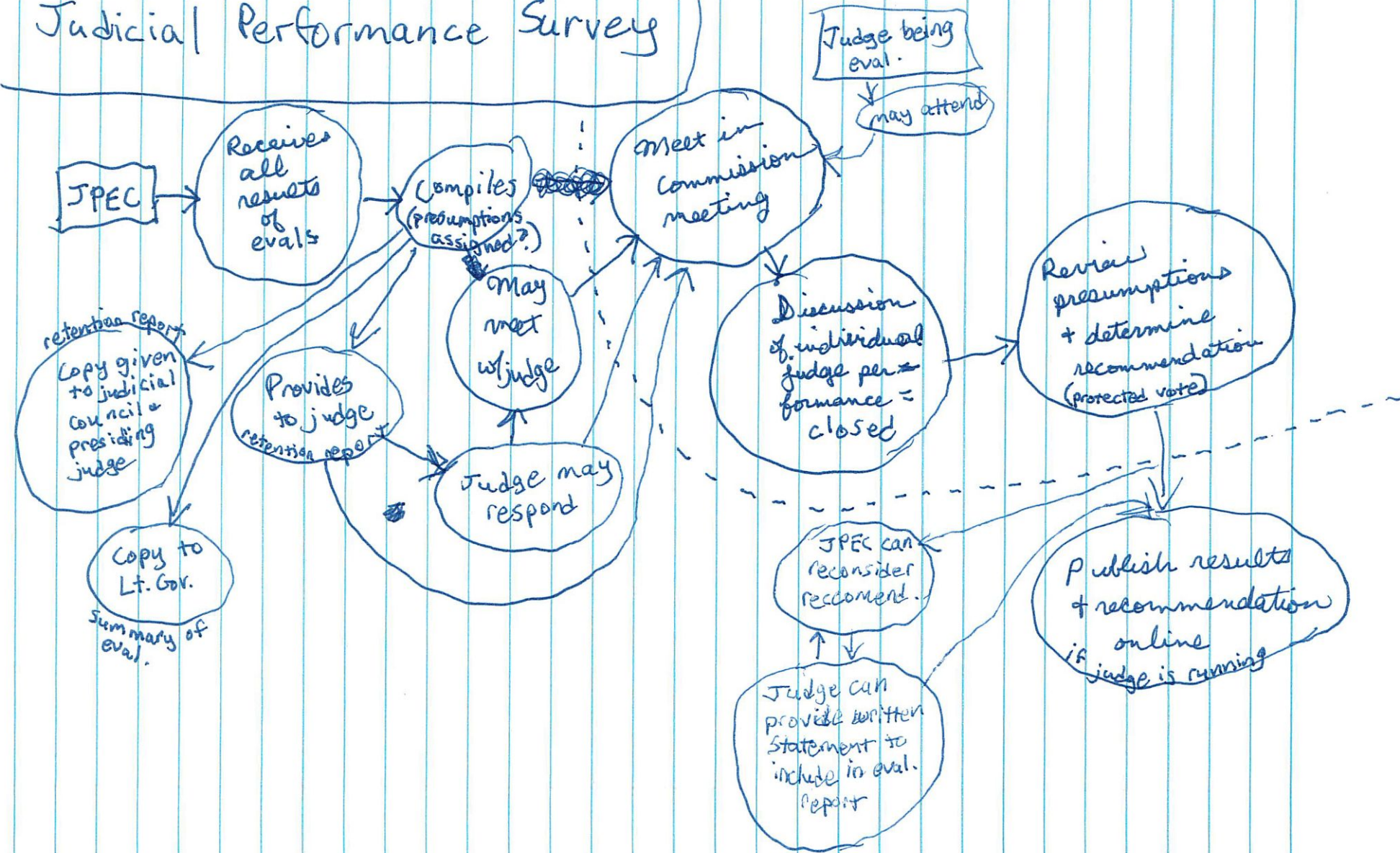
# Creating a retention schedule (2 of 2)



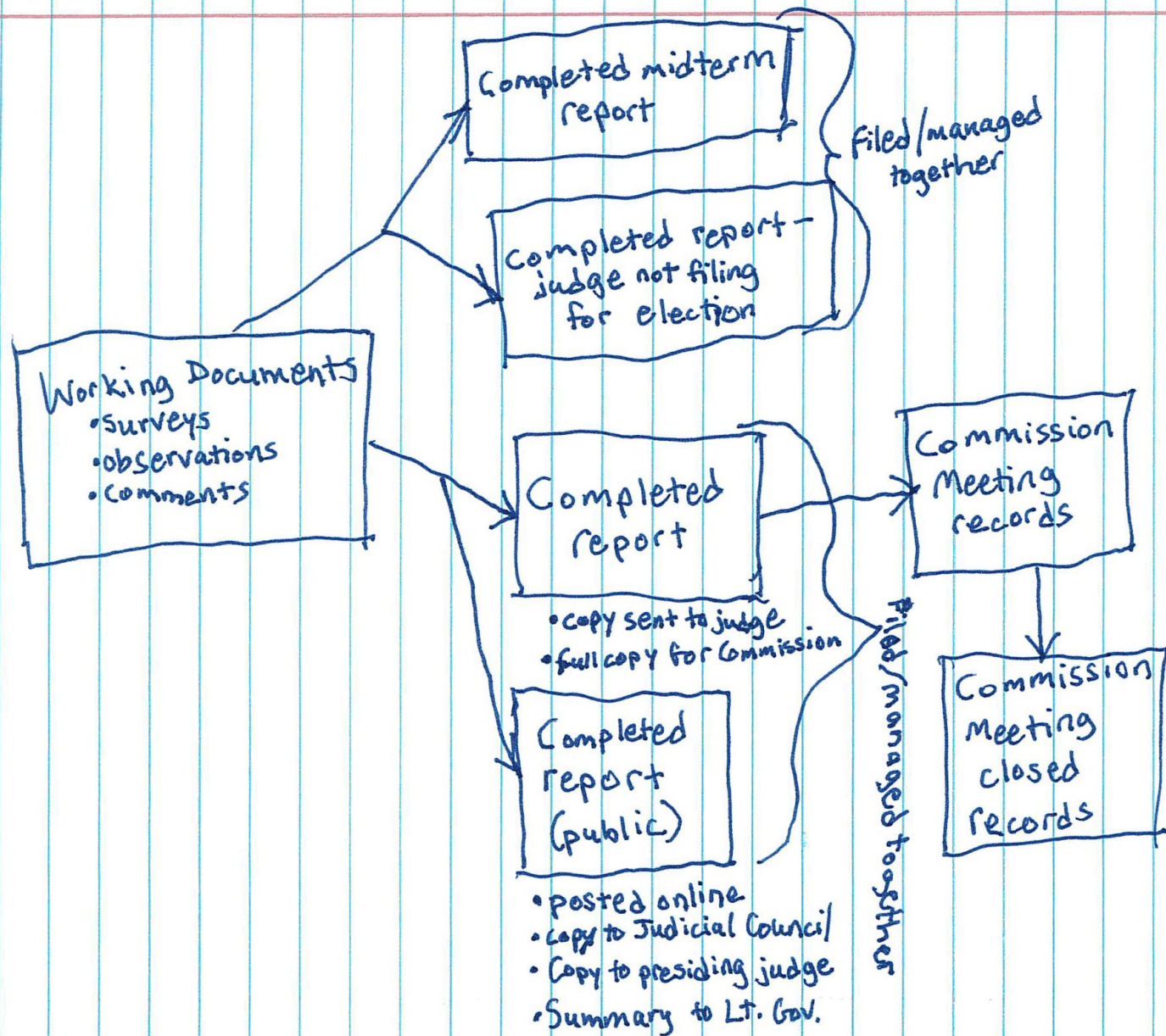
# MOTION PICTURE INCENTIVE PROGRAM function flowchart



# Retention Report Judicial Performance Survey









# Diagram Agency Functions

---

- Better understand business functions & processes
- Find all possible locations of records
- Identify multiple copies and formats
- Engage co-workers in records management
- Manage records more accurately



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The background is a detailed steampunk illustration. It features a large, ornate clock face on the left side, with Roman numerals and a complex, multi-layered gear mechanism surrounding it. The gears are of various sizes and are interconnected, creating a sense of mechanical complexity. The overall color palette is dominated by browns, bronzes, and greys, with some highlights of green and blue on the clock's face and the gears' teeth. The lighting is dramatic, with strong highlights and deep shadows, emphasizing the metallic textures and the intricate details of the machinery.

# Analyzing your functions and records

What are we missing?

Why are we doing that?

Do we really need it?



# Where to start?

---

1. Do a records inventory
2. Check existing RIM governance records
- 3. Diagram agency functions to identify resulting records**
4. Identify your team



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# Is it a record?

---



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# Problem Statements in UX Discovery | Design Thinking: Study Guide | Identify and Document Your UX Methods | How to Fit Big Tables on Small Screens

External

Inbox x



**Jakob Nielsen** <alertbox@nngroup.com> [Unsubscribe](#)  
to me ▾

Mon, Aug 23, 10:29 AM



[View this email in your browser](#)

## NN/g Newsletter

### New Articles



#### Problem Statements in UX Discovery

In the discovery phase of a UX project, a problem statement is used to identify and frame the problem to be explored and solved, as well as to communicate the discovery's scope and focus.

6 min read



#### Design Thinking: Study Guide

Unsure where to start? Use this collection of links to our articles and videos to learn about design thinking.

4 min read

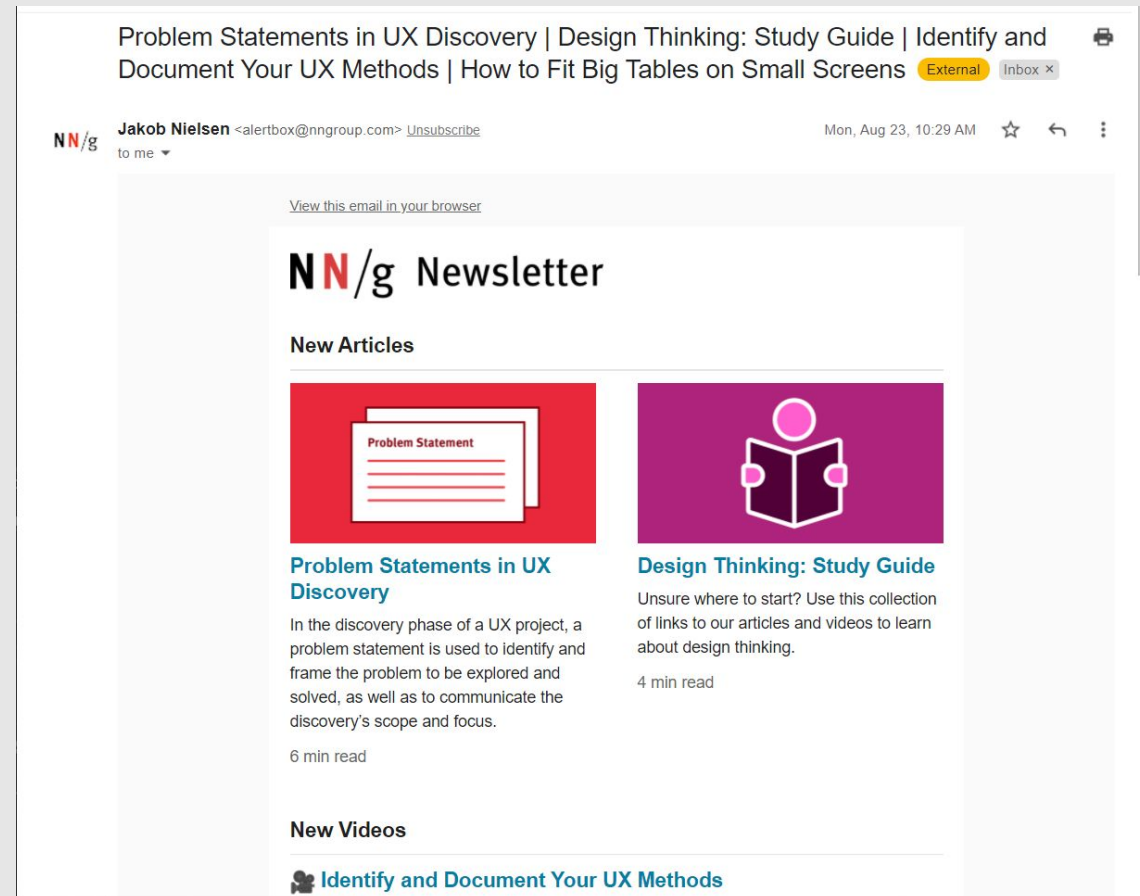
### New Videos



**Identify and Document Your UX Methods**

# Is it a record?

- A. Yes
- B. No
- C. Not sure

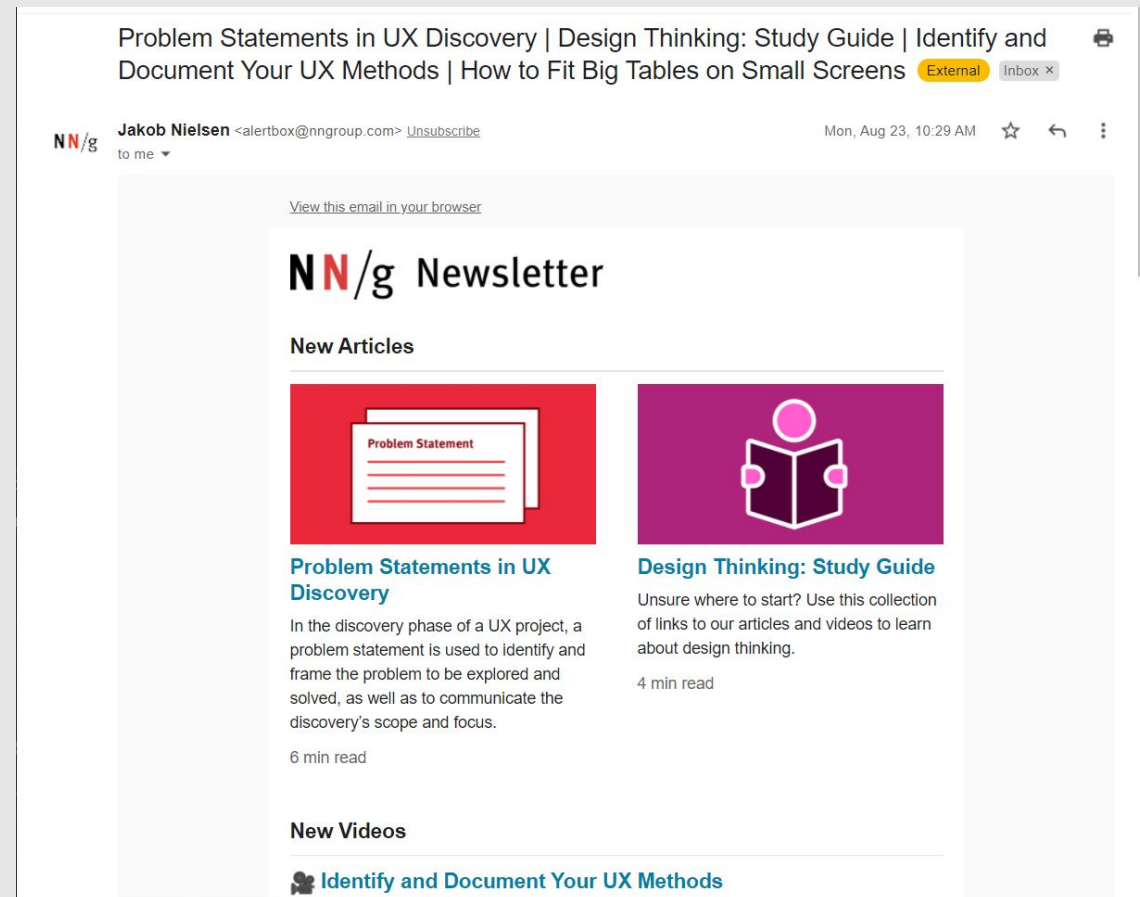


# Is it a record?

A. Yes

B. No

C. Not sure



## How we plan to fight drought, regulatory creep, and more



**Office of Gov. Spencer Cox** govcomm@utah.gov via mailchimpapp.net  
to me ▾

Fri, Jul 30, 11:02 AM



[View this email in your browser](#)

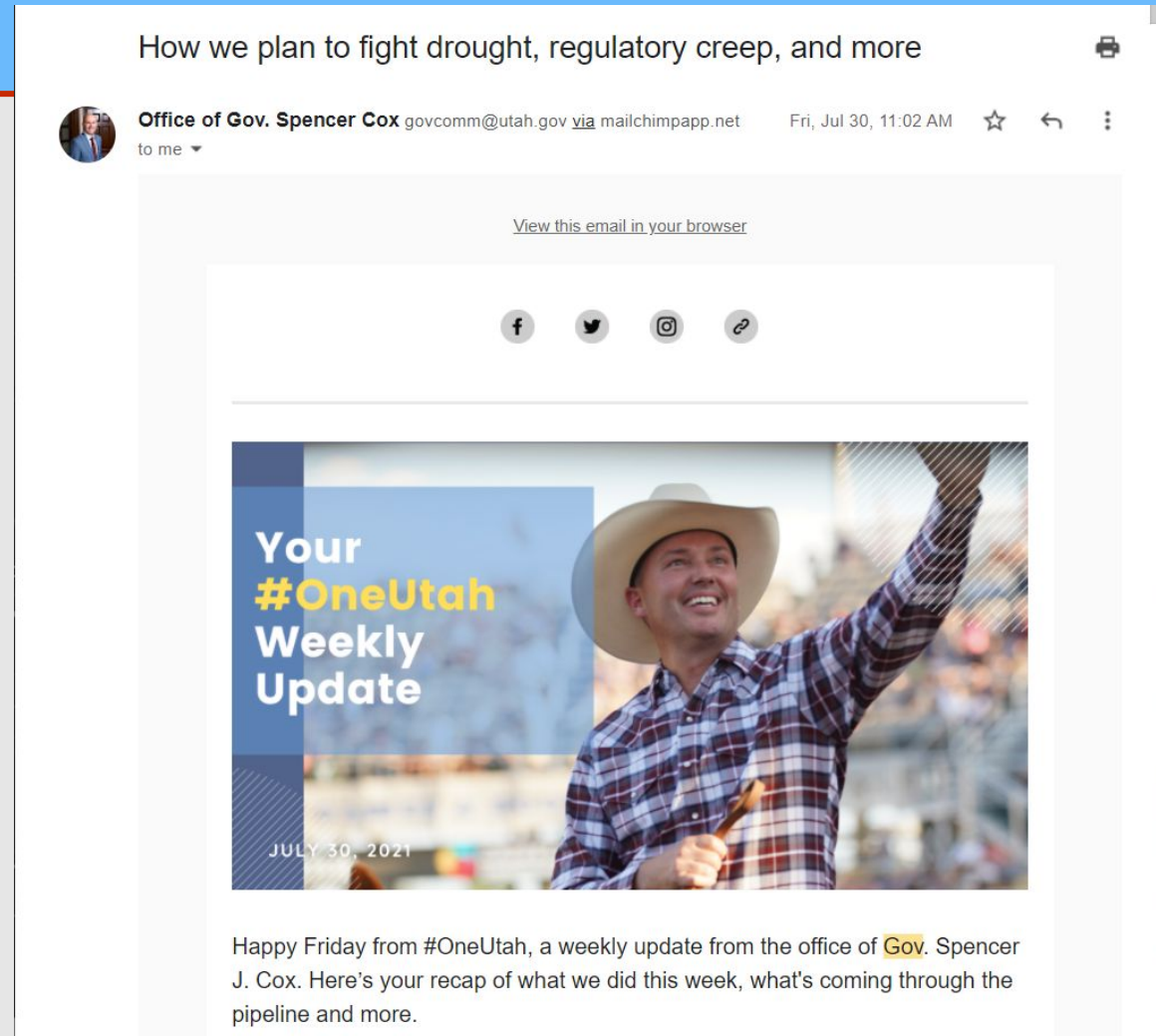


Happy Friday from #OneUtah, a weekly update from the office of Gov. Spencer J. Cox. Here's your recap of what we did this week, what's coming through the pipeline and more.



# Is it a record?

- A. Yes
- B. No
- C. Not sure

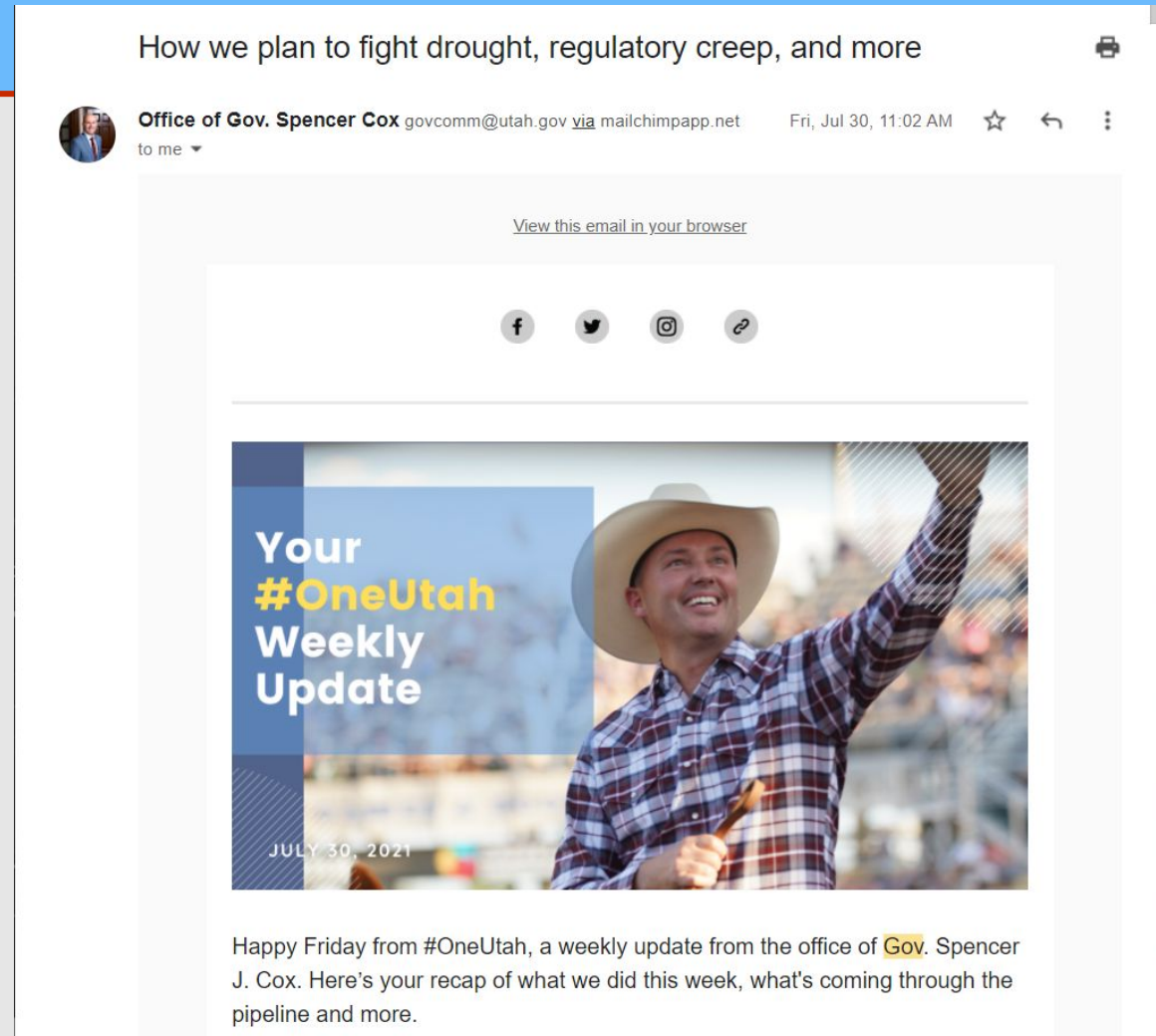


# Is it a record?

A. Yes

B. No

C. Not sure





## RIM Guideline for Documenting the Pandemic and Earthquake

We would like to produce something akin to [Wyoming's brief guideline](#) on documenting COVID-19.

### What should you save to document your agency's response to the pandemic?

- Consider starting one or more COVID-19 files for documents specifically related to this time. It can be a series in your internal network files, a folder in your email, and a folder for paper files. However you keep your records!
- Social media posts: If you're communicating with the public, or internally with staff, these would be good records to preserve. Unless you are using a vendor to collect your social media, the best way remains taking screen shots of posts and interactions, and saving them as pdfs – in your COVID-19 file.
- Website content. If this duplicates what's on your social media, no need to save the content from both places. Save a few screenshots to show you were using your web page during this time and preserve the rest via your social media platforms (or vice versa)
- Typical written documents:
  - Telework and social distancing plans
  - Reports and memos on work and communications during this time
  - Press releases and press coverage of your unit's response
  - Correspondence showing significant new policies or work practices in place during the pandemic. Remember, only save what is produced by your office, not documents that originated elsewhere.
- Photos, videos, and other visual documents of life of your office – on site and virtual. Consider taking a screenshot of your staff video call grid, closed/reduced services signs you posted on your facility, and saving



Heidi Steed  
5:28 PM Apr 20

Resolve

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9:39 AM Apr 21

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9:40 AM Apr 21

Resolve





# Is it a record?

A. Yes

B. No

C. Not sure

The screenshot shows a Google Docs interface. The document title is "Guideline for Documenting the Pandemic and Earthquake". The main text of the document is as follows:

**RIM Guideline for Documenting the Pandemic and Earthquake**

We would like to produce something akin to [Wyoming's brief guideline](#) on documenting COVID-19.

**What should you save to document your agency's response to the pandemic?**

- Consider starting one or more COVID-19 files for documents specifically related to this time. It can be a series in your internal network files, a folder in your email, and a folder for paper files. However you keep your records!
- Social media posts: If you're communicating with the public, or internally with staff, these would be good records to preserve. **Unless you are using a vendor to collect your social media, the best way remains taking screen shots of posts and interactions, and saving them as pdfs -- in your COVID-19 file.**
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  - Press releases and press coverage of your unit's response
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- Photos, videos, and other visual documents of life of your office -- on site and virtual. **Consider taking a screenshot of your staff video call grid, closed/reduced services signs you posted on your facility, and saving**

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**Heidi Steed**  
5:28 PM Apr 20  
[Resolve](#)

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Renee Wilson <reneewilson@utah.gov>

## Fwd: Get ready to join the GovOps Amazing Challenge!

1 message

Katherine Layton <krayton@utah.gov>

Tue, Feb 22, 2022 at 4:30 PM

To: Department of Government Operations <GovOpsAll@utah.gov>

Geek Challenge Brackets are open! Go to <https://geekbracket.dts.utah.gov/> to fill out your bracket by March 2.




### Join the GovOps Challenge 2022

Everyone is invited to join us for a series of monthly Challenges designed for all staff, in-office and remote, to participate in. Information will be provided during our monthly Town Hall meetings. You'll also be able to find information on the GovOps Intranet under "GovOps 2022 Challenge"

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The logo is a circular emblem with a blue border. Inside the circle, the words "GOVOPS" are written in a yellow, sans-serif font along the top arc, and "AMAZING" is written along the bottom arc. In the center of the circle is a stylized mountain range with a blue peak and yellow base. Overlaid on the bottom half of the circle is the word "CHALLENGE" in a large, bold, yellow, italicized sans-serif font.

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# 4. Your RIM Team



division of  
**Archives and  
Records Service**



Image courtesy #WOCinTechChat

# Your RIM Team

---

- RIM is for everyone!
- Records officers need support
  - From management
  - From colleagues
- RIM involves many roles / has many facets



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Records Service**

# Elements of a RIM Program



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Records Service**

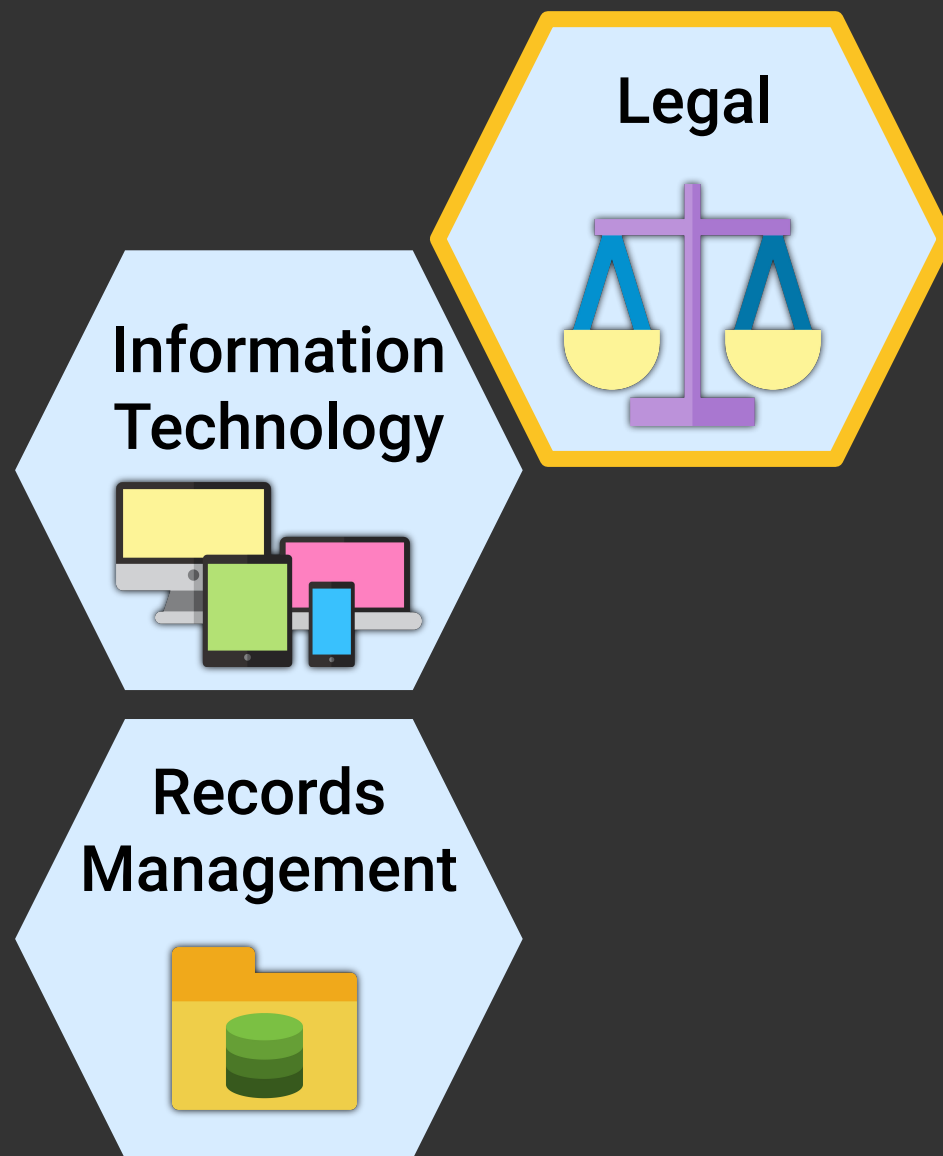
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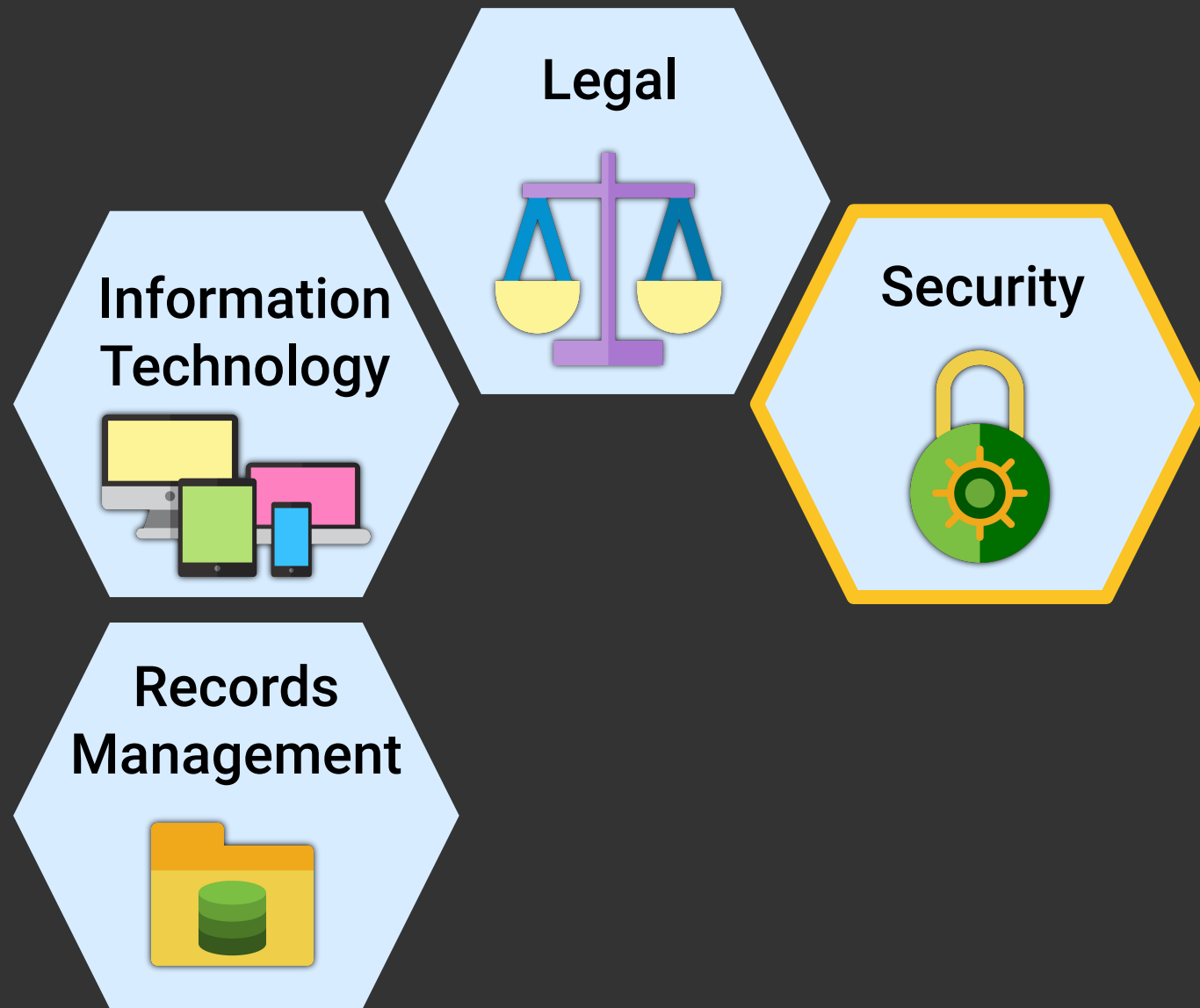
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# Elements of a RIM Program



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# Elements of a RIM Program



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# Identify your team

---

- Who at your organization fills each role?
- = Your best allies in implementing a RIM program



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# Clarify responsibilities

---

- What is each employee's RIM responsibility?
- Some responsibilities can be delegated
  - Boxing up records, creating box lists, transferring records, etc.
- Determine responsibility throughout records life cycle



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# Raise awareness

---

- Show real-world examples of RIM (good & bad)
- Share useful facts in staff meeting/newsletter
- Post information in the kitchen or bathroom
- Create informational videos (use staff as actors!)
- Bring chocolate to RIM discussions
- Make it fun / attractive



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# Be the expert

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- Know your records
- Certify
- Create a business case
- Be enthusiastic about records
- Cultivate professional associations



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# Where to start?

---

1. Do a records inventory
2. Check existing RIM governance records
3. Diagram agency functions to identify resulting records
- 4. Identify your team**



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Records Service**



# EMAIL MANAGEMENT GUIDELINE

Effective Date:	March 2017
Revision Date:	November 2019
Review Date:	

**PURPOSE:** State and local government agencies need to know how to manage and preserve emails, and the Division of Archives and Records Service has the responsibility to establish standards and provide training for the effective management and care of records ([Utah Code 63A-12-101\(2\)\(c\)](#)). Acknowledging that records management needs, workloads, and complexities vary widely across government, the intent of this guideline is to establish baseline standards that ensure legal compliance but are still broad enough to provide each governmental entity the flexibility to shape management practices to fit its unique requirements.

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## 200206 Notes: NAGARA webinar: RM Assessments as Opportunities

- 25% of time spent looking for records
- The intersection between system usability and internal RIM; yes maybe the system is usable but are the records being managed?
- ISO-15489: assessment for internal RIM
  - Preliminary investigation, business process analysis, records and legal requirements, system analysis
- Paper used to be part of the process, paper would go into central files at the end
- Diagram of processes and systems; ARO is usually not connected to everyone like they need to be
- **"Keeping everything is not a viable option and will cost you more money."**
- Talk to people who are actually touching and using the records
- Software for RIM - I'd love to help improve this someday
  - Preliminary investigation: inventory
  - Setting up retention schedules
  - Attach the people, agencies, mandates, availability
- Where is everything stored?
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## Detailed Outline

### Webinar 1: Getting started / learning about your records / getting others on board

#### 1. Where do I start?

- **Existing RIM records**

- any inventories, transfer sheets, etc from previous people
  - located on shared drive, in email, with physical files
- Archives website
- Archives box report

- **Inventory**

- several ways to document what you have
  - by location
  - by type (hard copy, digital)
  - by employee
  - (examples of inventories)
    - very detailed may not be feasible to start
    - best start: is this a record?
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          - what is a record
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          - email is a record
          - social media is a record
        - Series

- **Agency functions**

- law says what functions your agency does (for state agencies; local sometimes have to look elsewhere)



Kendra Yates  
10:24 AM Apr 16

[Resolve](#)

This looks fantastic, Renée!  
I have communicated the plan to do three weekly 1-hour webinars for this May training. She'll work with you on making a plan to notify AROs.



Avalon Snell  
7:22 AM Apr 14

[Resolve](#)

see comment below



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File Edit View Insert Format Tools Add-ons Help [Last edit was 3 days ago](#)

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## Travel Reimbursement Request for Out-of-State Travel

This required form **MUST** be filled out completely and original receipts sent in order to submit your request accurately and timely. Once completed, submit to *State Travel 4120 SOB, Box 1117 for Inner Office Mail, or email to [dastravel@utah.gov](mailto:dastravel@utah.gov)*.

Agencies should ensure travel reimbursement requests are completed accurately and approved within **45 days** from the date of return of the trip.

Name: Renée Wilson	DAS Division: Archives	
Employee # <b>100790</b>	Email: reneewilson@utah.gov	
Purpose of Trip: Professional development – Society of American Archivists (SAA) Annual Meeting, plus two full-day courses for DAS (digital archives specialist) re-certification		
Destination: Austin, TX		
Departure Date: Tuesday, July 30, 2019	Departure Time: 11:45 AM	
Departure Home Base Address: Archives, 346 S. Rio Grande St., Salt Lake City, UT 84101		
Return Date: Tuesday, August 6, 2019	Return Time: 9:30 PM	
Arrival Home Base Address: <b>2000 E. University Avenue, Provo, UT 84601</b>		
Incidental Expenses. (If no receipt you can only claim \$19.99 per item)		
Date: Date	Taxi	Amount: \$
Date: Tuesday, July 30, 2019, Tuesday, August 6, 2019	Shuttle	Amount: \$16.57, \$16.57 (\$33.14 total)
Date(s): Tuesday, July 30, 2019, Tuesday, August 6, 2019	Baggage Fees	Amount: \$30, \$30 (\$60 total)

## SuperShuttle

Call (512) 258-3826 Option 3, at least one day in advance for return reservations

PASSENGER RECEIPT

7/30/2019 6:29:55PM

CONF#: 1079618

PASSENGERS: 1

Wilson, Renee

JW Marriott Austin

Austin 78701

FARE:	\$ 11.50
SERVICE CHARGE:	\$ 0.00
DRIVER FEES:	\$ 0.00
COMPANY FEES:	\$ 3.00
DISCOUNT:	\$ 0.00
TIP:	\$ 2.07
COMP/GIFT CERT:	\$ 0.00
TOTAL DUE:	\$ 16.57

PAYMENT TYPE: PREPAID

TOTAL PAID: \$ 16.57

CHANGE DUE: \$ 0.00

THIS IS A RECEIPT  
NOT VALID FOR TRANSPORTATION



# Is it a record?

- A. Yes
- B. No
- C. Not sure

## Travel Reimbursement Request for Out-of-State Travel

This required form **MUST** be filled out completely and original receipts sent in order to submit your request accurately and timely. Once completed, submit to *State Travel 4120 SOB, Box 1117 for Inner Office Mail, or email to [dastravel@utah.gov](mailto:dastravel@utah.gov).*

Agencies should ensure travel reimbursement requests are completed accurately and approved within **45 days** from the date of return of the trip.

Name: Renée Wilson	DAS Division: Archives	
Employee # [REDACTED]	Email: reneewilson@utah.gov	
Purpose of Trip: Professional development – Society of American Archivists (SAA) Annual Meeting, plus two full-day courses for DAS (digital archives specialist) re-certification		
Destination: Austin, TX		
Departure Date: Tuesday, July 30, 2019	Departure Time: 11:45 AM	
Departure Home Base Address: Archives, 346 S. Rio Grande St., Salt Lake City, UT 84101		
Return Date: Tuesday, August 6, 2019	Return Time: 9:30 PM	
Arrival Home Base Address: [REDACTED]		
Incidental Expenses. (If no receipt you can only claim \$19.99 per item)		
Date: Date	Taxi	Amount: \$
Date: Tuesday, July 30, 2019, Tuesday, August 6, 2019	Shuttle	Amount: \$16.57, \$16.57 (\$33.14 total)
Date(s): Tuesday, July 30, 2019, Tuesday, August 6, 2019	Baggage Fees	Amount: \$30, \$30 (\$60 total)

## SuperShuttle

Call (512) 258-3826 Option 3, at least one day in advance for return reservations

PASSENGER RECEIPT

7/30/2019 6:29:55PM

CONF#: 1079618

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Wilson, Renee

JW Marriott Austin

Austin 78701

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# Questions?

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Renée Wilson, RIM Specialist, Utah State Archives

[reneewilson@utah.gov](mailto:reneewilson@utah.gov)

801-531-3842

Find your RIM specialist at [archives.utah.gov/rim/records-analysts.html](https://archives.utah.gov/rim/records-analysts.html)

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**Archives and  
Records Service**